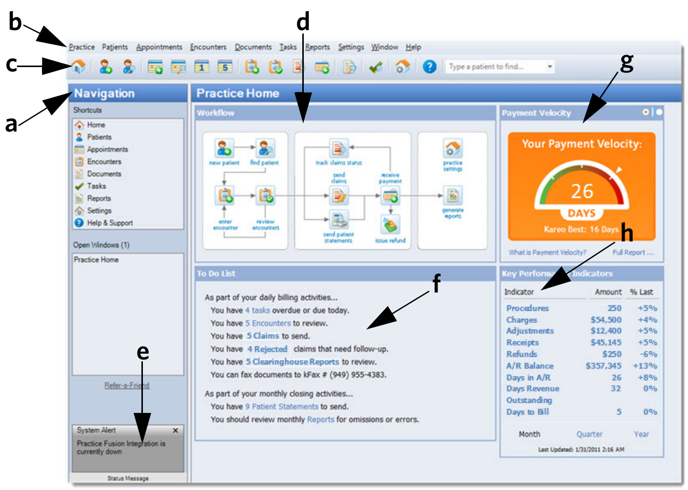
Care360®

Care360® EHR
Patient Management and Scheduling

You can use Care360 to manage patient demographic information and schedule patient appointments. Patient schedules that you create are accessible on the *Quick View* page of Care360 EHR.

Navigate the Care360 Practice Management Home Page



When you open a practice, the dashboard will always be your starting point. Your dashboard is set by your administrator.

- **Navigation**. Lists common shortcuts and open windows.
- **Menu Bar**. Contains menus of commands.
- **Toolbar**. Icons denoting shortcuts to common commands.
- **Workflow**. A visual guide of shortcuts to your workflow.
- **Status Message**. Notes any messages and alerts as they relate to the Care360 Practice Management application.
- **To Do List**. Generated to help you track your work. Click a link to reach an area where you can complete that task.
- **Dashboard Charts**. Depending on your user role, you can switch between multiple charts.
- **Key Performance Indicators**. Help you to monitor key metrics that impact the health of a medical practice.

For a detailed training video, refer to http://www.kareo.com/support/training-videos/getting-started. For additional Training Guides, see http://www.kareo.com/support/guides.

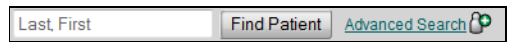
Add and View Patient Data in Care360 Practice Management

1. From the *Patients* menu, click *Find Patients*, and then enter search criteria to see if the patient already exists in the system.
2. If the patient is not yet in the system, continue with step 3, otherwise select the patient name from the search results.
3. To add a patient, click *New*, then do the following:
   a. Enter general patient information and contact information.
   b. Select providers.
   c. If necessary, check the box and type guarantor information.
   d. Select payer scenario.
4. After completing patient information, do one of the following:
   - Click *Save* to exit the *New Patient* page.
   - Click *Save & Add Policy* to add insurance information.
   - Click *Save & Add Case* to create a case for the patient.
     Note: See *About Patient Cases* in the user manual for more information regarding new patient setup.
   - A user with scheduling permissions can click *Save & Schedule* to immediately schedule a patient appointment.
     Note: See *Appointment: New Patient* in the user manual for more information.
   - Click *Cancel* to exit the task without saving changes.

   Note: Once a record has been saved using the above options, you can access the patient record using the *Edit Patient* task. For a detailed training video, see http://www.kareo.com/support/training-videos/managing-patient-records.

Access Patient Data in Care360 EHR

1. Locate the patient search bar on any page of the EHR.



2. In the search box, type a patient name (in the format *Last*, *First*).
3. Click *Find Patient*, then click a patient name in the list of results.

Create an Appointment

1. From the *Appointments* menu, click *Daily* or *Workweek Calendar*.
2. At *Resources*, check the boxes next to any resources to schedule.
3. Select a date on the calendar in the top-right of the window.
4. Double-click a slot in the calendar to open a new appointment.
5. Click *Patient* to open the *Find Patient* window.
6. Double-click a patient to add their name or click *New*.
7. Complete the appointment details fields as needed.
8. Click *Save* to save your work, or *Cancel* to exit without saving.
   For a detailed training video, see http://www.kareo.com/help/videos/appointment-scheduling.

View a Schedule

1. From the *Appointments* menu, click a calendar.
2. Do one of the following as needed:
   - To show appointments for a different time frame, click the appropriate date from the date picker.
   - Select a *Location* to filter the appointments by location.
   - To filter the appointments by a specific provider or resource, click the name of a provider or resource in the *Resources* area.

View and Print Appointments in Care360 EHR

1. From the *Message Center* tab, click *Quick View*.
2. Review the appointment list then do any of the following:
   - To view a list of patients by provider, click the provider list and select the appropriate provider name.
   - To view a list of patients for the next day that patients are scheduled, click ▶.
   - To view all of today's patients, keep the default view.
3. Click the print icon at the top of the appointment list.
4. Configure any print settings as needed, and then click *Print*.
5. When you are finished printing, close Adobe Reader.

For help, contact the Help Desk at 1-800-697-9302.

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