Steps to Configure RegiMate in Kareo

Your RegiMate service is designed to work seamlessly with your practice's Kareo Practice Management system.

FIND YOUR "KAREO PRACTICE ID"
From within Kareo Practice Management, go to:
SETTINGS | OPTIONS | INTEGRATION OPTIONS
The practice's specific Kareo ID is displayed at the top, e.g. Kareo_5842_29

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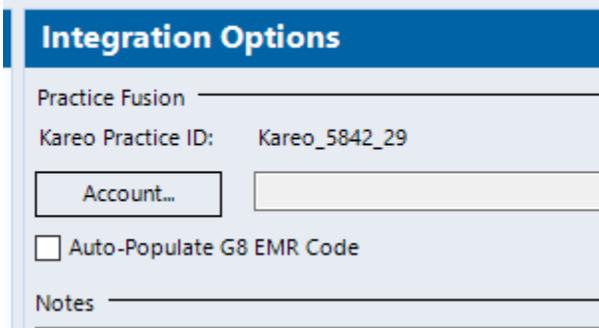
GET YOUR KAREO "CUSTOMER KEY"

HELP | GET CUSTOMER KEY…

Kareo My Account
Go Practice
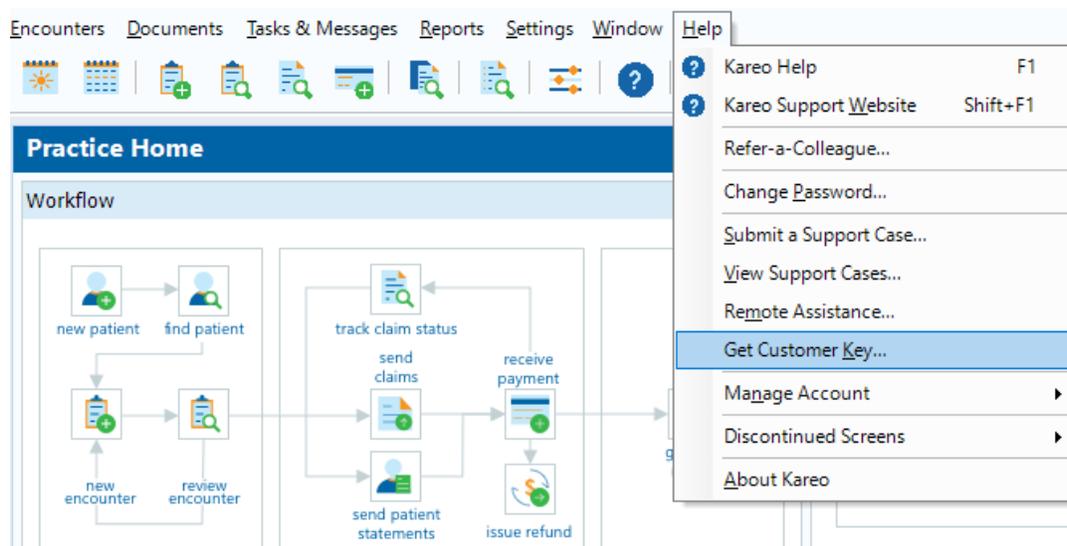
Get Customer Key

Access the Kareo web services API.

Note: The customer key is not needed for Kareo EHR. The customer key is only needed for Kareo Practice Management paired with a partner EHR.

The Kareo web services API is a solution for enabling third-party computer programs to access Kareo data and functionality. As an added security measure, you are required to use a Kareo Customer Key in addition to your Login and Password in order to access your data through the Kareo API.

Your key: w▮▮▮▮▮▮▮▮e

Please contact Kareo if you need more customer keys

Security Note: Once you have your Kareo Customer Key, your System Administrator must also grant your user account with the appropriate permissions within Kareo to enable web services access to your data:

To enable web services access

1. Log in to Kareo.

2. Click **Settings > User Accounts** in the top menu.

3. Click the appropriate User Account.

4. Under Permissions, check Full Control for the permission EHRs and API.

Use your Kareo Practice ID and Customer Key to complete our New Practice Setup form.

Sign Up Here!
https://regimate.online/practice

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<u>SETUP AN "API" USER</u>
Settings | User Accounts
+ New User Account
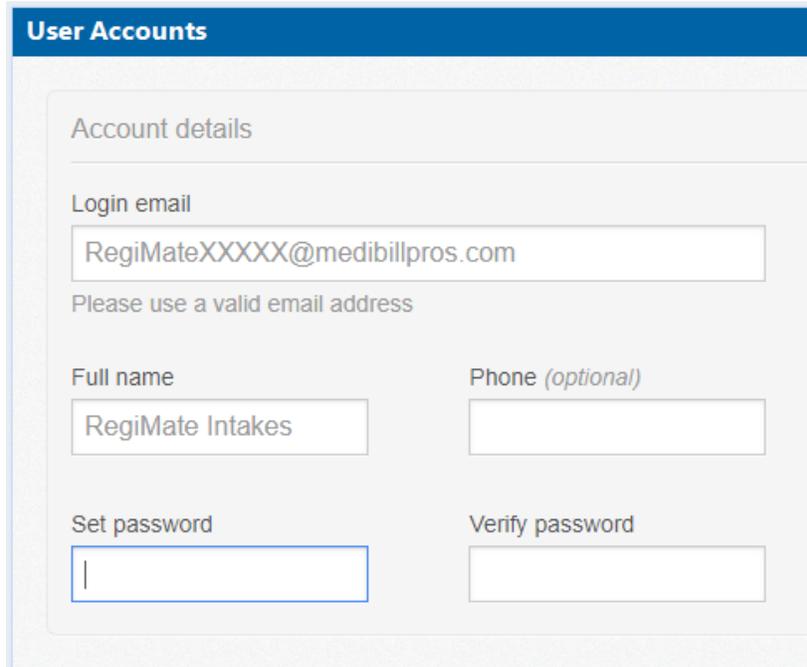
Login email:
RegiMateXXXXX@medibillpros.com (where XXXX is your Kareo ID number, e.g.

RegiMate5842_29@medibillpros.com

Full name:
      RegiMate Intakes
Set password:

aBcD1234

Grant this user access to the following practices:
      (Check box next to practice you are setting up to accept RegiMate intakes.)

Custom Permissions-
Check box for Full Control for 'EHRs & API':

User Accounts

		Full Control	View	Create	Edit	Delete
Appointments	❓		☐	☐	☐	☐
Claims	❓	☐	☐	☐	☐	☐
Clearinghouse Report	❓	☐	☐			
Codes	❓		☐	☐	☐	☐
Contracts & Fees	❓		☐	☐	☐	☐
EHRs & API	❓	☑			☑	
Encounters	❓	☐	☐	☐	☐	☐
Kfax	❓	☐				
Manage Documents	❓	☐				
Manage Patient Portal	❓	☐				
Manage Web User Roles	❓	☐				
Master Audit Log	❓		☐			
Patient	❓		☐	☐	☐	☐

Save New User   or   cancel

Click Save New User button

When we receive your Practice Setup Form, we will do a test login and also submit a Test Registration to ensure it is setup correctly…and you are Good To Go!