Steps to Configure RegiMate in Kareo

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

<u>FIND YOUR "KAREO PRACTICE ID"</u> 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

Integration Options				
Practice Fusion	Kareo_5842_29			
Account				
Auto-Populate G	8 EMR Code			
Notes				

GET YOUR KAREO "CUSTOMER KEY"

HELP | GET CUSTOMER KEY...

<u>E</u> ncounters <u>D</u> ocuments <u>T</u> as	ks & Messages – <u>R</u> epor	ts <u>S</u> ettings	<u>W</u> indow	<u>H</u> el	p		
🐺 🎬 🚖 🚖	🖹 🚃 🖹 🖹 🗍	🖹 🔁		0	Kareo Help	F1	
	d -o -d	• u -•		0	Kareo Support <u>W</u> ebsite	e Shift+F1	
Practice Home					Refer-a-Colleague		
Workflow					Change <u>P</u> assword		
					<u>S</u> ubmit a Support Case	2	
				View Support Cases			
new patient	track claim status				Re <u>m</u> ote Assistance		
	send	receive			Get Customer <u>K</u> ey		
new review encounter encounter statements issue	payment		Ma <u>n</u> age Account				
					Discontinued Screens		
	· •	9		<u>A</u> bout Kareo			
	send patient statements	issue refund		_			



My Account » Get Customer Key

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 e
Please cont	ct 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

SETUP AN "API" USER

Settings | User Accounts + New User Account

User Accounts	
Account details	
Login email	
RegiMateXXXXX@medibill	pros.com
Please use a valid email address	;
Full name	Phone (optional)
RegiMate Intakes	
Set password	Verify password

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':

Accounts						
		Full Control	View	Create	Edit	De
Appointments	0					(
Claims	0					(
Clearinghouse Report	0					
Codes	0					
Contracts & Fees	0					
EHRs & API	•	• • • • • • •				
Encounters	0					
(fax	0					
Manage Documents	0					
lanage Patient Portal	0					
Nanage Web User Roles	0					
Naster Audit Log	0					
Patient	0					



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!