



Integrate Kareo with Third-Party Applications Using the Kareo Web Services API 2.1



Introduction

-
-
-
-
-
-
-
-

Important Note:

Table of Contents

1. Configuring Security and Access

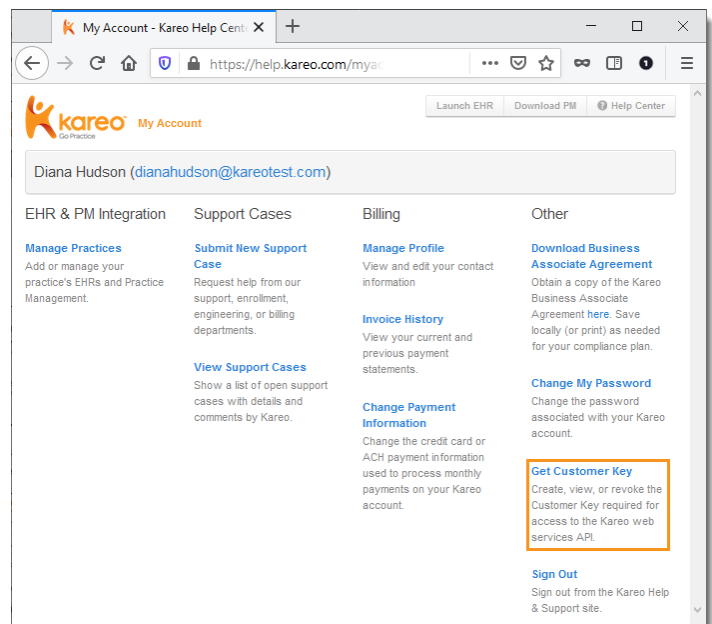
Account

Get Customer Key

Get Customer

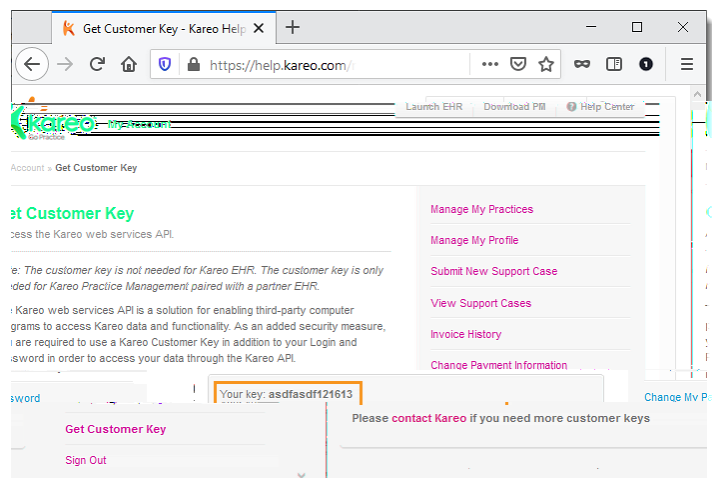
Key

My



Create my customer key

Your key



For Kareo accounts created after May 2016:

Settings **User Accounts** *User*
Accounts *Edit User*

Save User

The 'Edit User' form is displayed within the 'User Accounts' window. It includes a breadcrumb trail: 'User Settings' > 'Edit User'. A blue banner at the top contains a warning icon and the text: 'Be sure to select the appropriate user type so that the account is configured correctly.' Below this, the 'User Type' section has two buttons: 'Provider' and 'Non-Provider' (which is selected with a checkmark). The 'Account Information' section contains three input fields for 'First Name' (Sandy), 'Middle Name' (empty), and 'Last Name' (Brown). Below these are fields for 'E-Mail' (sandybrown@kareotest.com) and 'Phone' (empty). The 'Password' and 'Repeat Password' fields are both masked with dots. The 'Roles' section, with a 'Learn more' link, lists several roles: 'System Admin' (checked and highlighted with an orange box), 'Office Staff', 'Provider', 'Biller', 'Clinical Assistant', and 'Business Manager'. The 'Additional Options' section has a checked checkbox for 'Allow emergency access for *A Place for Healing'. At the bottom, there are four buttons: 'Save User' (blue), 'Cancel', 'Delete User', and 'Lock User'.

For Kareo billing company accounts and
accounts created before May 2016:

Settings **User Accounts** *User*
Accounts *Account details*

Permissions
Account Administrator

Save Changes

The 'Permissions' tab is selected in the 'User Accounts' window. It shows a section titled 'What permissions should this user have?' with two buttons: 'Account Administrator' (selected) and 'Custom Permissions'. Below this, it states 'This user has full access to the application.' A 'Confirm: Account Administrator' section follows, containing a 'Warning' about the implications of making a user an Account Administrator. A link 'Click here to learn more about permissions, users, and roles in Kareo.' is provided. A confirmation question 'Are you sure you want to continue? Please type "ADMIN" in the box below to continue:' is followed by an input field containing 'ADMIN'. At the bottom, there are two buttons: 'Save Changes' (blue) and 'cancel'.

2. Using the Kareo Web Service API

-

-

-

-

-

-

-

-

-

-

-

-

-

3. General Guidelines on Consuming Kareo API

4. Understanding the Operations

Field Name	Description	Required

[illegible]

[illegible]

Field Name	Description	Where to find in Kareo

Field Name	Description	Required

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

Field Name	Description	Where to find in Kareo

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

Field Name	Description	Required

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

Field Name	Description	Where to find in Kareo

Field Name	Description	Required

Field Name	Description	Where to find in Kareo

Field Name	Description	Where to find in Kareo

Field Name	Description	Required

Field Name	Description	Where to find in Kareo

[illegible]

[illegible][illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

Field Name	Description	Where to find in Kareo

Field Name	Description	Required

Field Name	Description	Where to find in Kareo

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

Field Name	Description	Required

Field Name	Description	Where to find in Kareo

5. API Support

Description



Kareo is the leading cloud-based complete medical technology platform purpose-built to meet the unique needs of independent practices in more than 45 specialties.

Today Kareo helps over 75,000 providers in all 50 states run more efficient and profitable practices, while delivering outstanding patient care. The Kareo technology platform is the first to help independent practices find more patients, manage their care with a fully certified and easy-to-use EHR, and get paid quickly all in one complete and integrated package.

Kareo has received extensive industry recognition, including the Deloitte Technology Fast 500, Inc. 5000, and Black Book's #1 Integrated EHR, Practice Management and Medical Billing vendor, as well as ranking at the top of the Leader Quadrant in the FrontRunners Software Analysis of EHR. Kareo's growth further demonstrates the expansion and vitality of the independent practice market in the U.S. With offices across the country, Kareo's mission is to help independent practices succeed in an ever-changing healthcare market. More information can be found at www.kareo.com or by calling 888-775-2736.