



CarePort Discharge Reporting

User Guide

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Contact Us

CarePort®, powered by WellSky®
201 South Street
Suite 501
Boston, MA 02111

Web: <http://www.CarePortHealth.com>

Client Support: (855) 488-6590

Client Support Email:

discharge.support@careporthealth.com

Revision History

Revision Date	Revision Number	Revision Description
2022 February	1.0	Hospital Operations Reports: Starting and Ending Dates
2022 April	1.1	<ul style="list-style-type: none"> • Medically Ready Days and Medically Ready Date • Unknown Placement Type roll-up • Application Usage Analysis • Readmission Analysis
2022 May	1.2	<ul style="list-style-type: none"> • Referral Trend Multi-Facility Selection • Added Glossaries for the Hospital Reports
2022 June	1.3	Updated screen captures for the Multi-Facility Decline Analysis dashboard
2022 July	1.4	Added Community Referral dashboard
2022 October	1.5	Rebranding
2023 April 26	1.6	<ul style="list-style-type: none"> • Updated screen captures • Moved individual Hospital Reports to the end of the guide
2023 May 24	1.7	Updated screen captures

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Introduction

CarePort Discharge Reporting is your one-stop-shop analytics portal. This interactive dashboard is meant to empower you with the best data possible.

Use the dashboard to achieve better success with the following:

- Identifying early indicators of value-based care risk
- Discharging patients to high-performing post-acute care providers and in-network post-acute care providers
- Forming and managing high-quality post-acute care provider networks
- Tracking post-acute care provider referral patterns to higher levels of care:
 - IRF (Inpatient Rehab Facility)
 - LTACH (Long-Term Acute Care)
- Integrating decision support into existing care transition workflows
- Providing visibility into readmission rates across post-acute care provider networks
- Successfully navigating the dashboard to obtain the data most relevant to you
- Utilizing filters and drill-downs for further analysis
- Downloading data views to any of the following types of files:
 - Image
 - Data
 - Crosstab (Excel)
 - PDF
 - PowerPoint



NOTE – The dashboard displays discharge-related metrics and provides an easy way to monitor the discharge process.

The CarePort Discharge Reporting Dashboard

The **CarePort Discharge Reporting** dashboard effectively provides a method for downloading discharge data. The dashboard is a tool that effectively provides an overview, as well as specific analysis views of the data you may need to study further.

You can view discharge data at the following levels:

- Health System
- Acute Care Facility
- Post-Acute Care (PAC) Provider
- Case Level

This level of detail has evolved to help you:

- Understand post-acute care provider network utilization.
- Observe trends across care level distribution.
- Assess post-acute care provider performance, which drives better financial program performance and improves clinical outcomes.

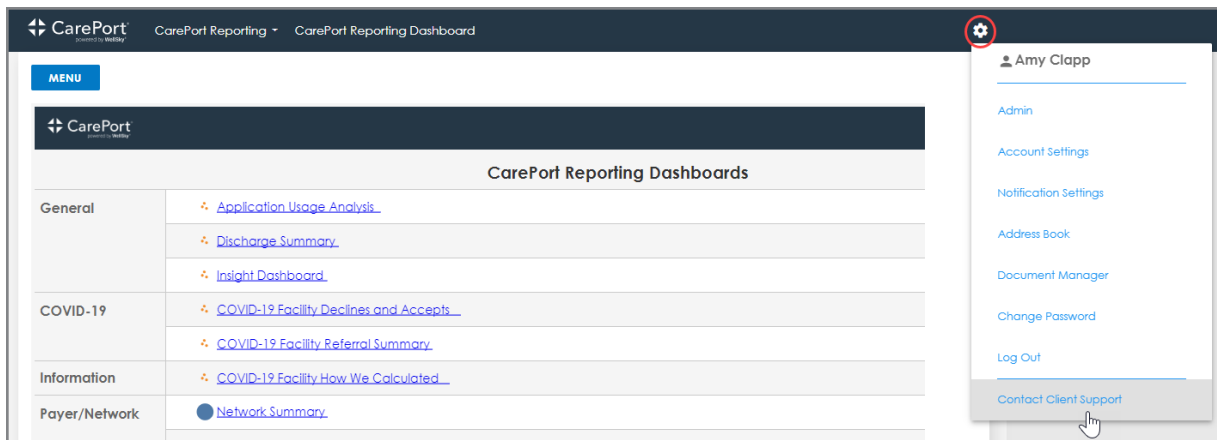
Contacting Client Support

Our Client Support team is staffed with application experts who can assist you with the functionality of CarePort solutions. They are also knowledgeable about technical configurations. CarePort Client Support is available between 8 a.m. to 7 p.m. EST, Monday–Friday, excluding major holidays.

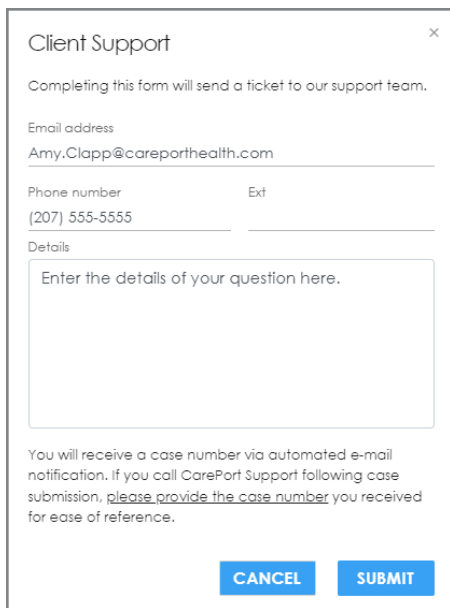
A support case can be opened with **Client Support** using any of the following three (3) methods:

1. From the CarePort Discharge application

1. Click the **COG**  icon and select the **Contact Client Support** option.



The **Client Support** pop-up box displays.

A screenshot of a 'Client Support' pop-up form. The form has a title bar with a close button (X). The text reads: 'Completing this form will send a ticket to our support team.' Below this are input fields for 'Email address' (containing 'Amy.Clapp@careporthealth.com'), 'Phone number' (containing '(207) 555-5555'), and 'Ext'. There is a 'Details' section with a large text area containing the placeholder text 'Enter the details of your question here.'. At the bottom, there is a note: 'You will receive a case number via automated e-mail notification. If you call CarePort Support following case submission, please provide the case number you received for ease of reference.' and two buttons: 'CANCEL' and 'SUBMIT'.

2. In the **Details** field, enter the details of your question or issue.

3. Click the **SUBMIT** button when finished.



NOTE – The nature and complexity of your inquiry will determine the time it takes to resolve your issue.

2. Via Email

Send an email to intake.support@careporthealth.com.

3. Via Telephone

If you wish to call Client Support, call either of our toll-free numbers from 8 a.m. to 7 p.m. EST, Monday–Friday.

- (855) 488-6590
- (800) 446-9614, and select option 4

Our goal is to answer your call directly; however, if all agents are busy assisting other clients, you have the option to leave a voicemail. Messages are returned within 24 to 48 hours.

Once a support case has been created, you will receive an email notification acknowledging receipt and providing the support case number, which should be referenced in all further communication. After case submission, a support representative will be in contact to work with you through case resolution.



IMPORTANT – Please note that for security reasons, CarePort Client Support is not able to unlock user accounts or reset passwords. Basic end users can reach out to their facility Admin User(s) for assistance, and Admin users can refer to the *CarePort Discharge Admin User Guide*.

Register for a Training Webinar

You can register for a **CarePort Discharge Reporting** training webinar by clicking the following link: <https://careporthealth.com/careport-discharge-reporting-dashboard/>.

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Accessing the CarePort Discharge Reporting Dashboard

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Introduction

The CarePort Discharge Reporting Dashboard can be accessed in two (2) ways.

From the Login Screen

1. Open your web browser and enter the following into the address bar: <https://network.curaspan.com/connect/commonservices>. The **Login** screen displays.

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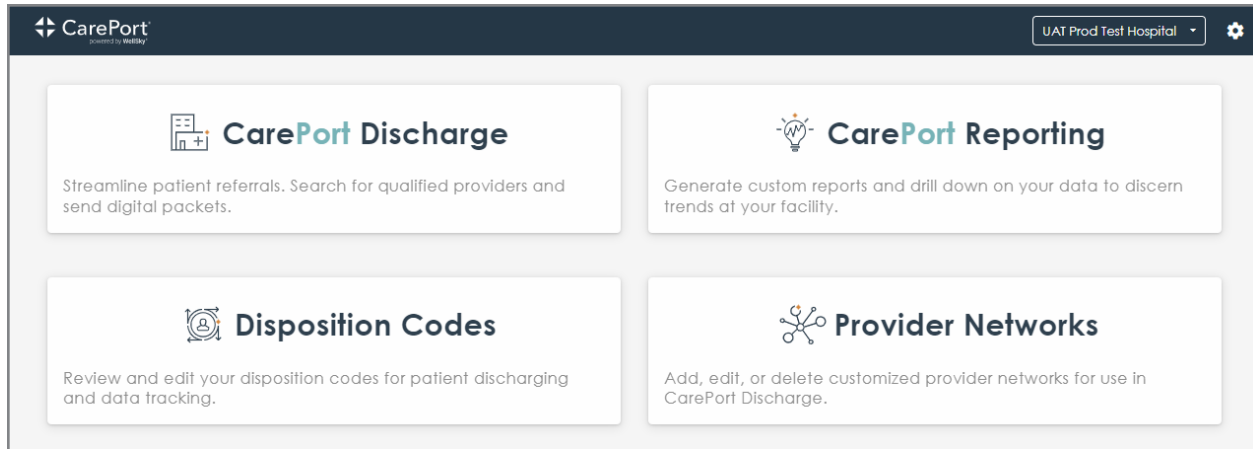
Username
aclapp@democi

Password

[Reset My Password](#) | [Recover Username](#) [Log In](#)

Notice to Users - This application is the private property of WellSky®. These computer systems, networks, and devices are provided for authorized use only for our Customers and their Authorized Users working in an official capacity. Unauthorized access or use outside an official capacity is not permitted. These systems are monitored to ensure protection from unauthorized access. Information gathered may be examined, recorded, and copied. Evidence collected during monitoring will be used by WellSky® to report any unauthorized or improper use of this application or equipment to law enforcement personnel or other authorities as appropriate. This may result in civil and criminal penalties. Use of this system constitutes consent to monitoring and reporting. By continuing to use this system you indicate your awareness of and consent to these terms and conditions of use. DO NOT SIGN IN if you do not agree to the conditions stated in this notice or you are not otherwise authorized to use this system.

2. Enter your username and password in the respective fields.
3. Click the **Log In** button or press the **[Enter]** key on your keyboard.
4. Click the **CarePort Reporting** tile within the window that displays.

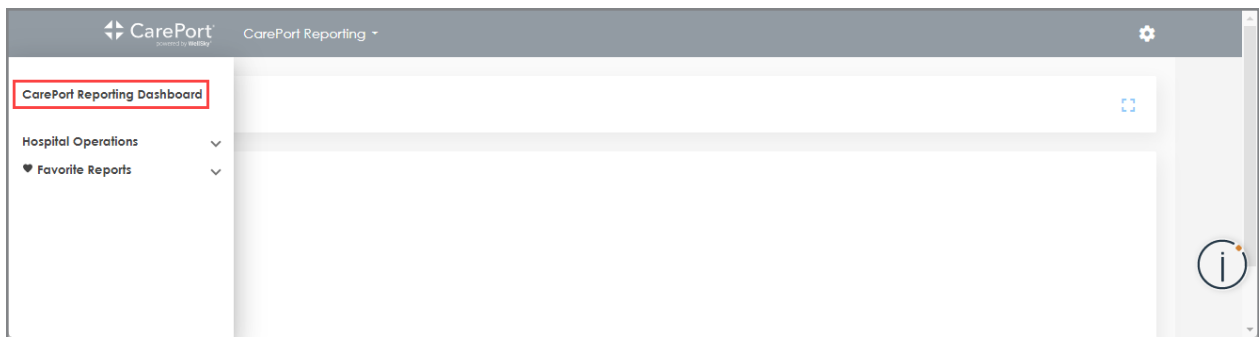


From Within CarePort Discharge

1. Click the expand icon to the right of **CarePort Discharge** in the upper left-hand corner of the screen and select the **CarePort Reporting** option.



2. Click the **CarePort Reporting Dashboard** link within the window that displays.



CarePort Reporting Dashboards Landing Page

The **CarePort Reporting Dashboards** landing page displays available dashboards within the following categories.

- General
- COVID-19
- Information
- Provider
- Patient/Referrals

The screenshot shows the CarePort Reporting Dashboards landing page. The page has a dark blue header with the CarePort logo and navigation links. Below the header is a 'MENU' button. The main content area is titled 'CarePort Reporting Dashboards' and lists various dashboard links, each with an icon indicating its facility type. The categories and their respective links are:

Category	Dashboard Link	Facility Type
General	Application Usage Analysis	Multi
	Discharge Summary	Multi
	Insight Dashboard	Multi
COVID-19	COVID-19 Facility Declines and Accepts	Multi
	COVID-19 Facility Referral Summary	Multi
Information	COVID-19 Facility How We Calculated	Multi
Payer/Network	Network Summary	Single
	Network Analysis	Multi
Patient/Referrals	Patient Details	Single
	Community Referral	Multi
	Decline Analysis	Single
	Multi-Facility Decline Analysis	Multi
	Readmission Analysis	Multi
	Referral Trend	Multi

Legend (Single or Multiple Organizations)
 ✦ Multi ● Single

Icons

The following two (2) icons denote if the dashboard is **Multi-Facility** or **Single-Facility**.

 Multi-Facility

 Single-Facility

Using the Tableau Toolbar

The Tableau toolbar is located at the bottom of each dashboard screen.

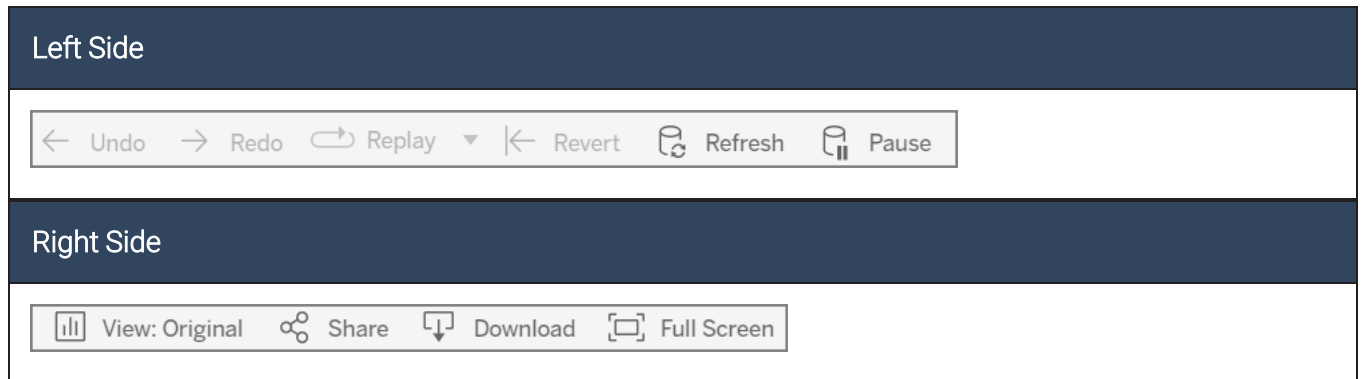


Table 2-1: Table 1: Tableau Toolbar Options

Option	Description
Undo	Reverses the most recent action.
Redo	Repeats the last action you reversed with the Undo button.
Revert	Returns the dashboard to its default view, undoing all user selections and/or filtering.
Refresh	Refreshes the dashboard with each click.
Pause	Allows you to make multiple selections before the dashboard refreshes.
View Original	Navigate among the default and custom views, as well as create new custom views.
Subscribe	This feature is not yet available and under development.
Share	Obtain a link to the current view for sharing with others.
Download	Use the available options to capture parts of your view for use in other applications.
Full Screen	View in full-screen mode. To exit, press the [Esc] key on your keyboard.

Selecting Options within the Facility Filter

The acute care **Facility** filter displays all acute care facilities in your system or Integrated Delivery Network (IDN), allowing you to change your dashboard data view to any single facility in your system or multiple facilities.

1. Select the **All** check box at the top of the list to select all facilities within in the list.
OR
Select the check boxes for **specific** facilities.
2. Click the **Apply** button.

Selecting Date Dimensions

When viewing a dashboard's output, you can increase or decrease the time period.

Option	Description
<input type="checkbox"/> Decrease	View data in longer time periods.
<input checked="" type="checkbox"/> Increase	View data in shorter time periods.

Downloading an Object or a View

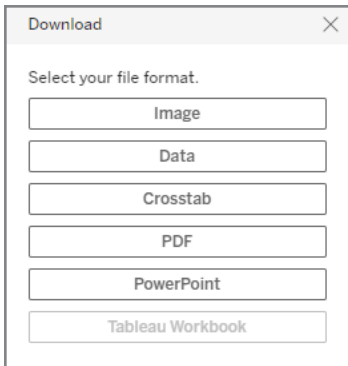
Use the Tableau toolbar’s **Download** option to export data or a chart to Excel, Image, or PDF.

1. Click inside the object (e.g., a data table) from which you want to download.

The screenshot shows a Tableau dashboard with a data table. The table has columns for 'In Provider Network', 'Out of Provider Network', and 'Grand Total'. A red circle highlights a mouse cursor clicking on a cell in the 'Out of Provider Network' column. The table data is as follows:

	In Provider Network	Out of Provider Network	Grand Total
Provider 1	23	41	64
Provider 2	0	124	124
Provider 3	0	10	10
Provider 4	0	79	79
Provider 5	0	88	88
Provider 6	0	3	3
Provider 7	0	58	58
Provider 8	0	9	9

2. Click the **Download** icon within the Tableau toolbar. The **Download** window displays.



3. Select the file type to which you want to download.

Table 2-2: File Type Options

File Type	Description
Image	Takes a snapshot of the area and produces a .png image file.
Data	Creates a Summary table of the data selected.
Crosstab	Downloads the selected data into an Excel file.
PDF	Downloads the selected data into a PDF file.
PowerPoint	Downloads the selected data into a PowerPoint file.



EXAMPLE – This is an example of downloading to an Excel file.

	A	B	C	D
1	Referral Status		Out of Provider Network	Grand Total
2	BOOKED	In Network Referrals		
3		Out of Network Referrals (Iod)	26.00	26.00
4		ZN(LOOKUP([Dynamic Measure],0)) along In/Out of Network	26.00	26.00
5	ACCEPT AND	In Network Referrals		
6	NOT BOOKED	Out of Network Referrals (Iod)	7.00	7.00
7		ZN(LOOKUP([Dynamic Measure],0)) along In/Out of Network	7.00	7.00
8	DECLINED	In Network Referrals		
9		Out of Network Referrals (Iod)	4.00	4.00
10		ZN(LOOKUP([Dynamic Measure],0)) along In/Out of Network	4.00	4.00

3

Multi-Facility Dashboards

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Introduction

The **Multi-Facility** dashboard consists of the following dashboards:

- [Application Usage Analysis](#)
- [Discharge Summary](#)
- [Network Analysis](#)
- [Community Referral](#)
- [Multi-Facility Decline Analysis](#)
- [Readmission Analysis](#)
- [Referral Trend](#)

Application Usage Analysis Dashboard

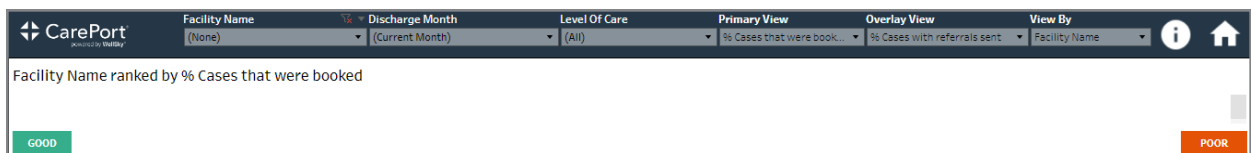
This dashboard offers insight into overall usage and process completion trends within CarePort Discharge. The measures are based by default on cases that required services (those with a placement type of **Facility**, **Transfer**, or **Home Care**).



NOTE – Previously, the **Placement Type** filter showed multiple values for **Unknown**. Effective April 21, 2022, these values now roll up into a single Unknown value.

The data from this dashboard answers the following questions:

- What is the impact of using **CarePort Discharge** for providing discharge services?
 - Where is **CarePort Discharge** being used most often and least often?
1. Click the [Application Usage Analysis](#) link on the Landing Page. The dashboard header displays.



2. Within the **Facility** field, select the desired facility(ies) and click the **Apply** button.
3. Within the **Discharge Month** field, select the option(s) you want to see and click the **Apply** button.
4. Within the **Level of Care** field, select the All option **or** individual option(s) and click the **Apply** button.



NOTE – By default, the **Primary View** field displays the **% Cases with referrals that were booked** option. A secondary view field titled **Overlay View** displays the **% Cases with referrals sent** option.

Both the **Primary** and **Overlay** view fields offer the following three (3) options:

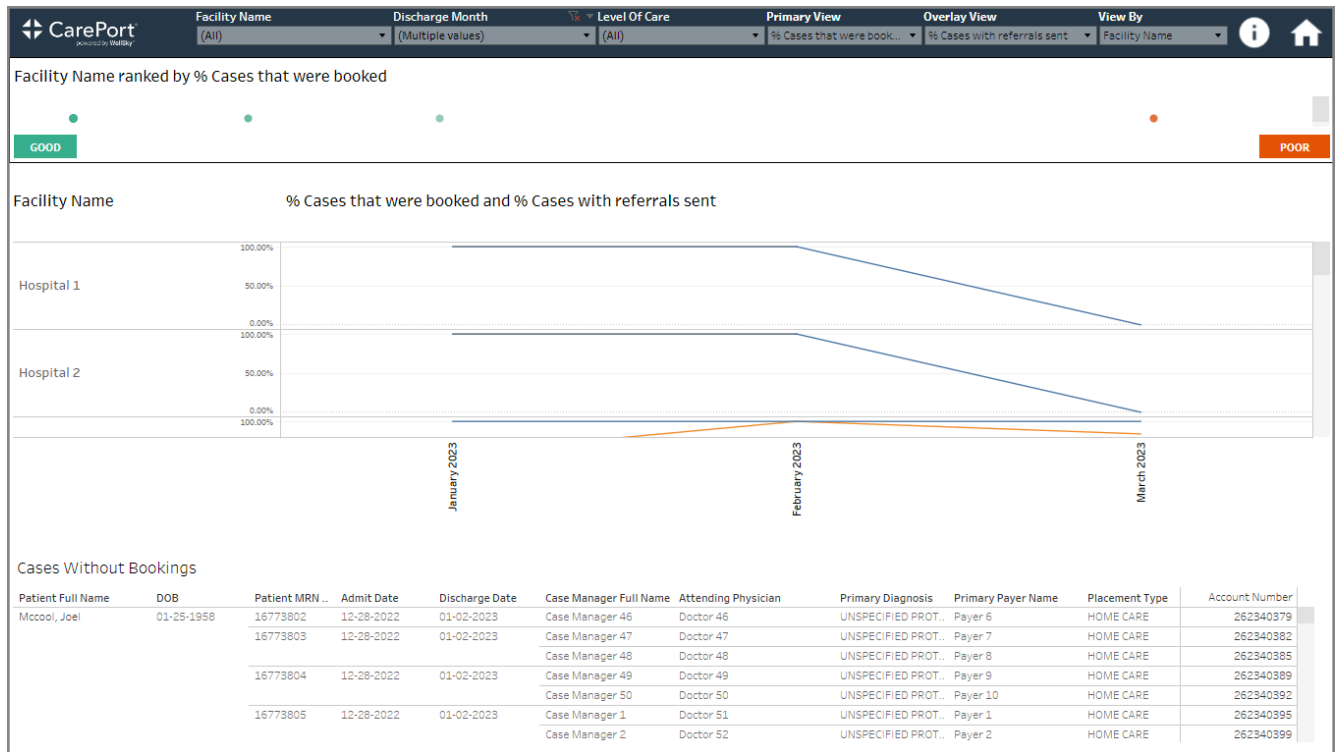
- % Cases with referrals sent
- % Cases that were booked
- % Cases Not Missing Data

If...	Then...
The Primary View is set to % Cases with referrals sent ,	The Cases Without Referrals table at the bottom of the screen displays a list of patient cases for which CarePort Discharge was not used to send referrals to post-acute care providers.
The Primary View is set to % Cases that were booked ,	The Cases Without Bookings table at the bottom of the screen displays a list of patient cases for which CarePort Discharge was not used to book a post-acute care provider.
The Primary View is set to % Cases Not Missing Data ,	The Incomplete Cases table at the bottom of the screen displays a list of patient cases with missing data.



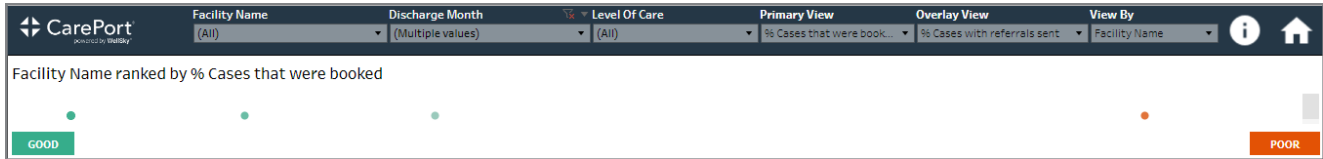
NOTE – By default, the **Facility Name** option displays in the **View By** field.

Based on your selections, the dashboard returns data.



Rating Scale

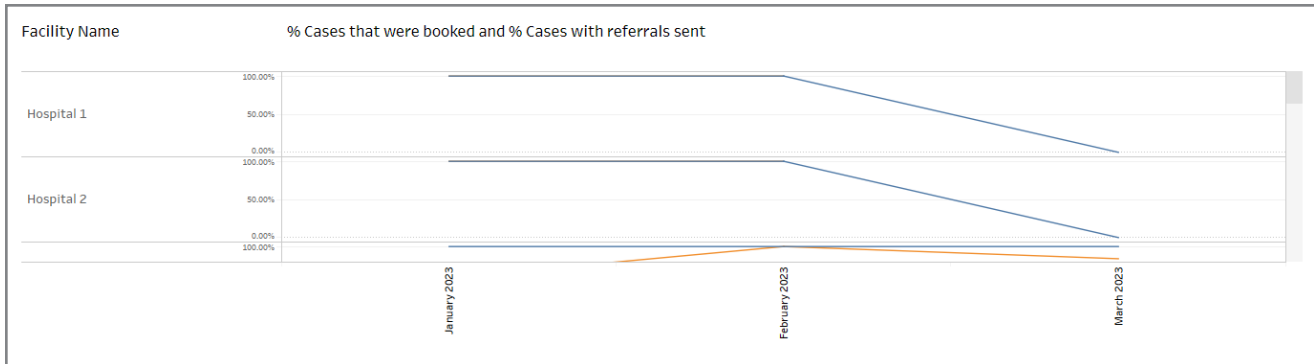
You can easily compare large numbers of facilities **or** post-acute care providers within the **Ranked** view at the top of the screen.



The plotted dots represent how the facilities **or** post-acute care providers rank with each other depending on the **Primary View** selection. The dot color changes are from **Good** to **Poor**, with dots shaded **green** indicating **better** performance and dots shaded **red** indicating **poorer** performance.

Long-Term Trend

This compares the percentage of cases **referred** to the percentage of those cases **booked** for the timeframe you selected.



NOTE – The **Primary View** is represented by the **orange** line and the **Overlay View** is represented by the **blue** line. If the same view option is selected for both, then only one (1) line displays for the monthly trend.

This dashboard allows you to better manage typical discharge planning activities and find early indicators of **Value-Based Care** risk with the following features:

- Formation and management of high-quality post-acute care networks to increase the discharge rate to in-network providers
- Tracking of post-acute care referral patterns to higher levels of care, such as IRF or LTAC
- Visibility into readmission rates across post-acute care networks and providers

Cases Without Referrals

The following table is an example of the **Primary View** being set to **% Cases with referrals sent**, which displays a list of patient cases for which CarePort Discharge was not used to send referrals to post-acute care providers.

Cases Without Referrals											
Patient Full Name	DOB	Patient MRN ..	Admit Date	Discharge Date	Case Manager Full Name	Attending Physician	Primary Diagnosis	Primary Payer Name	Placement Type	Account Number	
Training	03-02-1940	5933777	03-02-2020	04-12-2021	TEJUANA	DR. BROCK SANDERS	OTHER	AETNA	HOME	8345467446	
Jennifer	01-06-1940	2249508	12-28-2022	01-03-2023		DR. BROCK SANDERS	D94	AETNA	UNKNOWN	7720007261	
		5367580	12-28-2022	01-03-2023		DR. BROCK SANDERS	D94	AETNA	UNKNOWN	1688742038	
		5411274	12-28-2022	01-03-2023		DR. BROCK SANDERS	D94	AETNA	UNKNOWN	8831280454	
		4191872	01-01-2023	01-07-2023		DR. BROCK SANDERS	D94	AETNA	UNKNOWN	1484528498	
		01-10-1940	4191872	01-01-2023	01-07-2023		DR. BROCK SANDERS	D94	AETNA	UNKNOWN	1484528498
		02-01-1940	9436962	01-23-2023	01-29-2023		DR. BROCK SANDERS	D94	AETNA	UNKNOWN	1521514440
	12-14-1940	8039533	12-05-2022	12-11-2022		DR. BROCK SANDERS	D94	AETNA	UNKNOWN	7204230066	

NOTE – This table always reflects the inverse of the **Primary View** selection. If the **Primary View** is set to **Cases with Referrals sent**, then the table will be **Cases Without Referrals**.

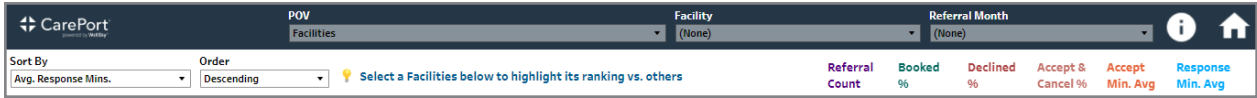
Cases Without Bookings

Cases Without Bookings										
Patient Full Name	DOB	Patient MRN ..	Admit Date	Discharge Date	Case Manager Full Name	Attending Physician	Primary Diagnosis	Primary Payer Name	Placement Type	Account Number
Mccool, Joel	01-25-1958	16773802	12-28-2022	01-02-2023	Case Manager 46	Doctor 46	UNSPECIFIED PROT.	Payer 6	HOME CARE	262340379
		16773803	12-28-2022	01-02-2023	Case Manager 47	Doctor 47	UNSPECIFIED PROT.	Payer 7	HOME CARE	262340382
					Case Manager 48	Doctor 48	UNSPECIFIED PROT.	Payer 8	HOME CARE	262340385
		16773804	12-28-2022	01-02-2023	Case Manager 49	Doctor 49	UNSPECIFIED PROT.	Payer 9	HOME CARE	262340389
					Case Manager 50	Doctor 50	UNSPECIFIED PROT.	Payer 10	HOME CARE	262340392
		16773805	12-28-2022	01-02-2023	Case Manager 1	Doctor 51	UNSPECIFIED PROT.	Payer 1	HOME CARE	262340395
					Case Manager 2	Doctor 52	UNSPECIFIED PROT.	Payer 2	HOME CARE	262340399

Discharge Summary Dashboard

This dashboard provides discharge information and summarization across multiple facilities. It provides an organization-wide perspective for the comparison of hospitals and how the post-acute care providers are responding to their referrals.

1. Click the [Discharge Summary](#) link on the Landing Page. The dashboard displays.

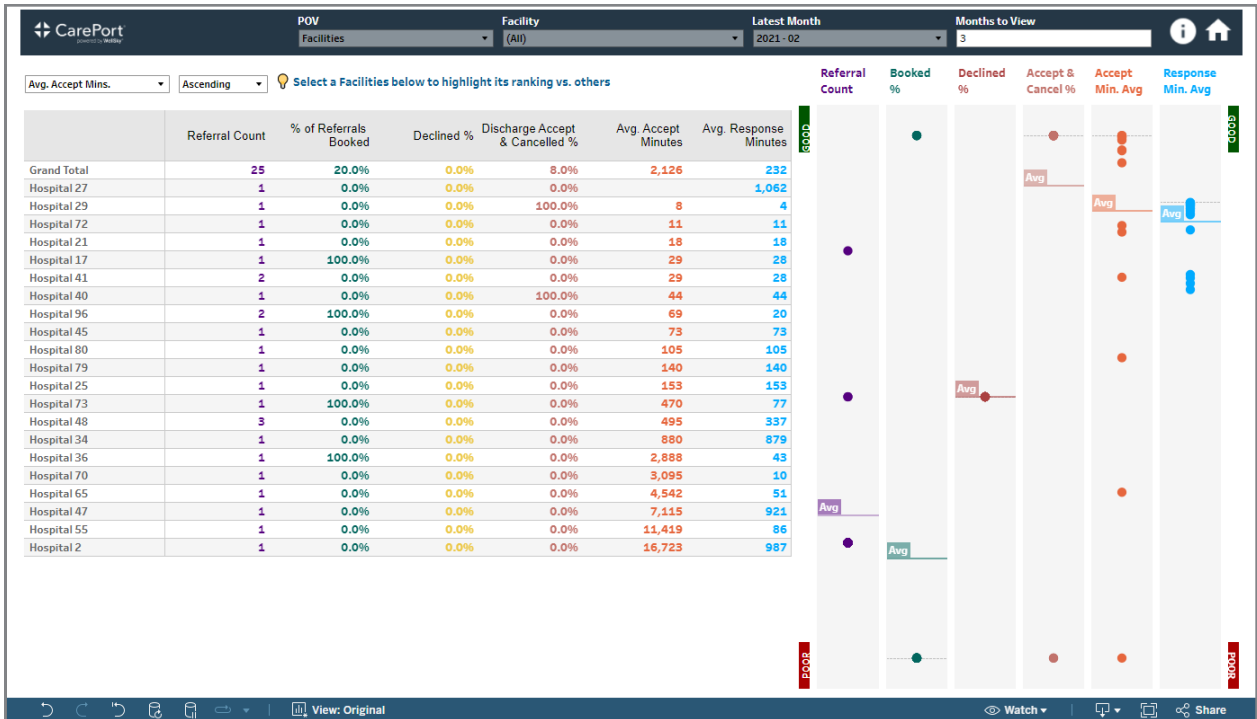


2. Select the desired POV. The default selection is **Facilities**.

- Facilities
- Care Levels
- Primary Payer Types
- Primary Payer Names

3. Select the desired **Facility(ies)** and click the **Apply** button.

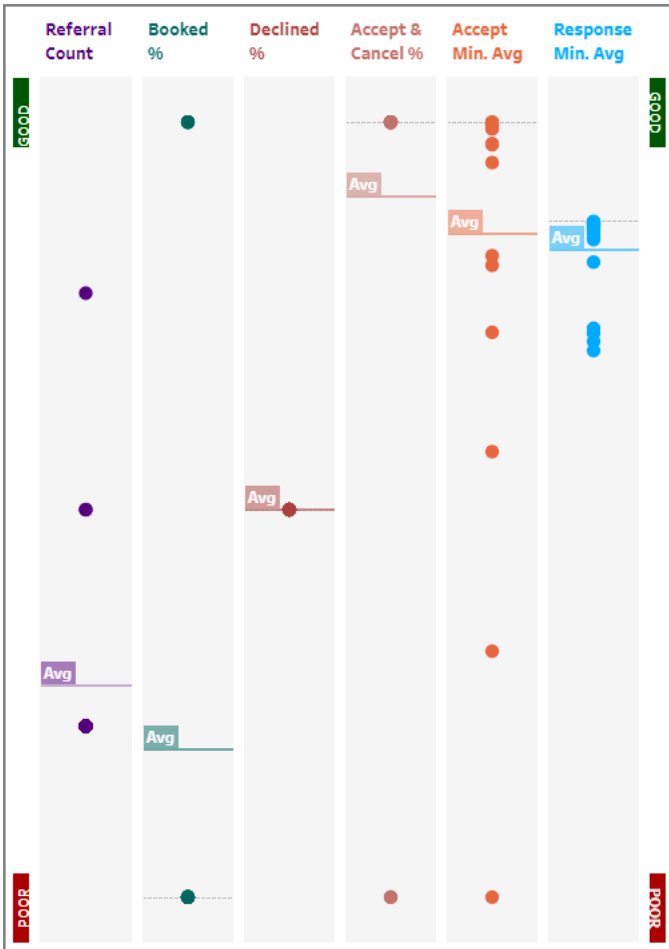
4. Select the desired **Referral Month**. The dashboard displays the results of the selected criteria.



From each POV you can view the following in descending or ascending order:

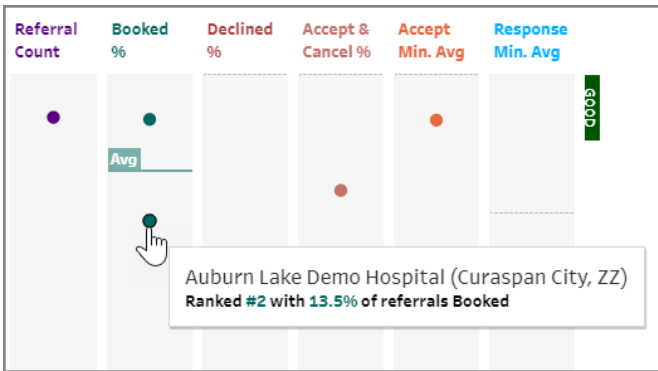
- Referral Count
- % of Referrals Booked
- Declined %
- Discharge Accept and Cancelled %
- Avg. Accept Minutes.
- Avg. Response Minutes

Within the right side, you can see all selected hospitals are plotted, representing a pictorial presentation of the data.

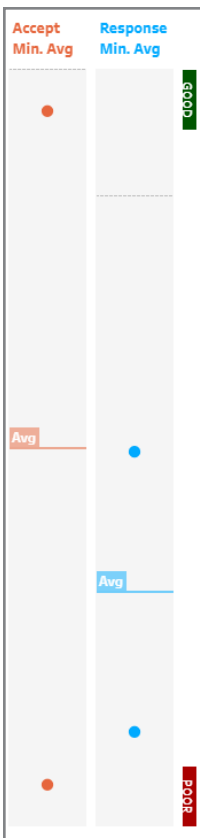


Included are Average (Avg) thresholds so you can determine which hospital is above or below average, which provides a comparison.

Hover over the plotted dots to see how each facility is performing compared to the other facilities.



The last two (2) columns indicate how much time in minutes the post-acute care providers are taking to accept your referral(s) or respond (set determination) to referrals.



NOTE – If you see lower marks for a certain facility, you can view the [Patient Details](#) dashboard to analyze further.

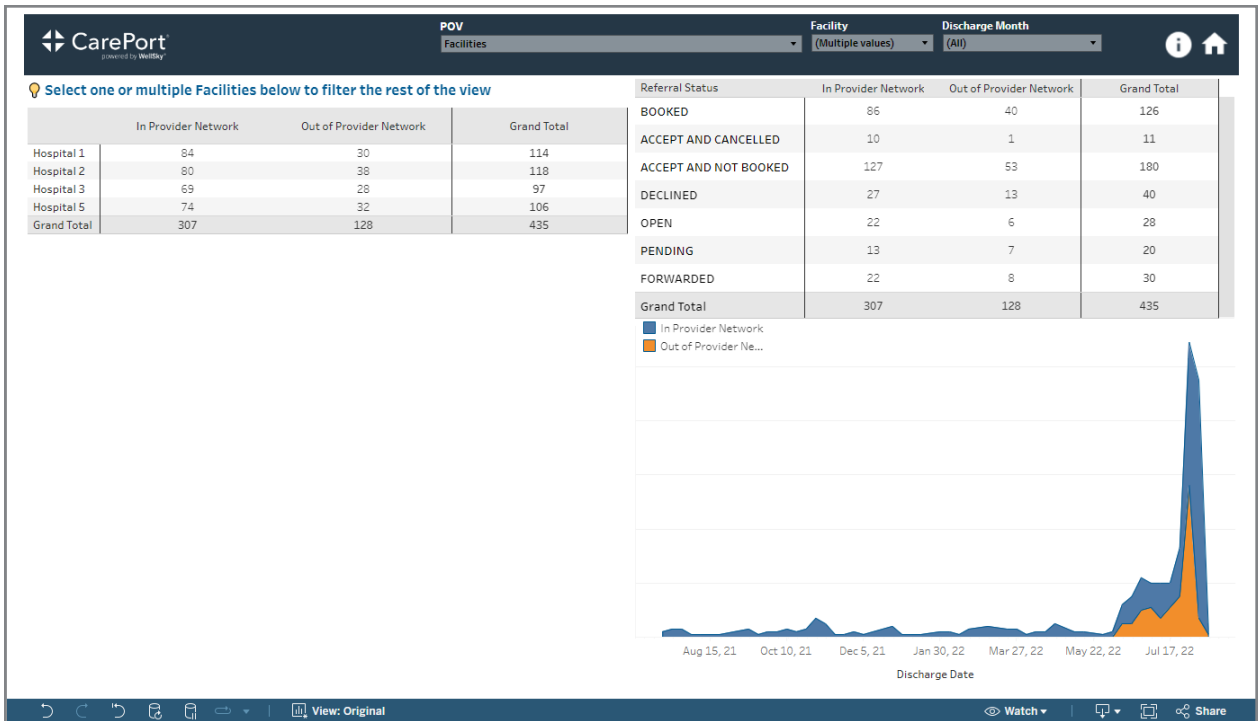
Network Analysis Dashboard

Use the **Network Analysis** dashboard to view referrals within provider networks and referrals outside of provider networks across multiple referral sources (Facilities).

1. Click the [Network Analysis](#) link within the Landing Page. The dashboard displays.



2. Select the desired POV.
3. Select the desired Facility(s).
4. Select the desired Discharge Month(s). The dashboard displays the results of the selected criteria.



Are You using In-Network PACs or Out-of-Network PACs?

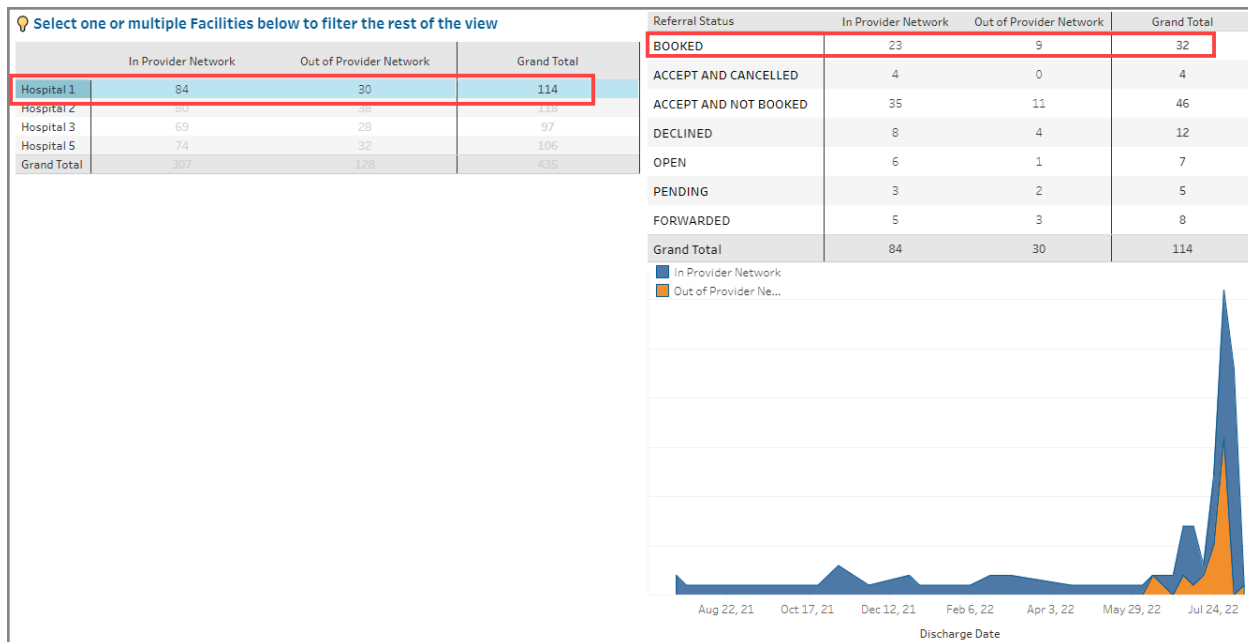
The chart within the top right provides a breakdown of what happened to your hospital’s referrals. Not only can you see the **Referral Status**, but of those statuses, the number sent to In Provider Networks and the number sent to Out of Provider Networks.

Referral Status	In Provider Network	Out of Provider Network	Grand Total
BOOKED	86	40	126
ACCEPT AND CANCELLED	10	1	11
ACCEPT AND NOT BOOKED	127	53	180
DECLINED	27	13	40
OPEN	22	6	28
PENDING	13	7	20
FORWARDED	22	8	30
Grand Total	307	128	435

Regarding the **Referral Status** of **BOOKED**:

- 86 were with **In Provider** Networks
- 40 were with **Out of Provider** Networks
- **Grand Total** of 126 Booked referrals

Select a single facility to see how it is performing when booking referrals.



The bottom right displays Hospital 1's trend over time in **volume**. This dashboard lists all facilities that roll up to the hospital group.

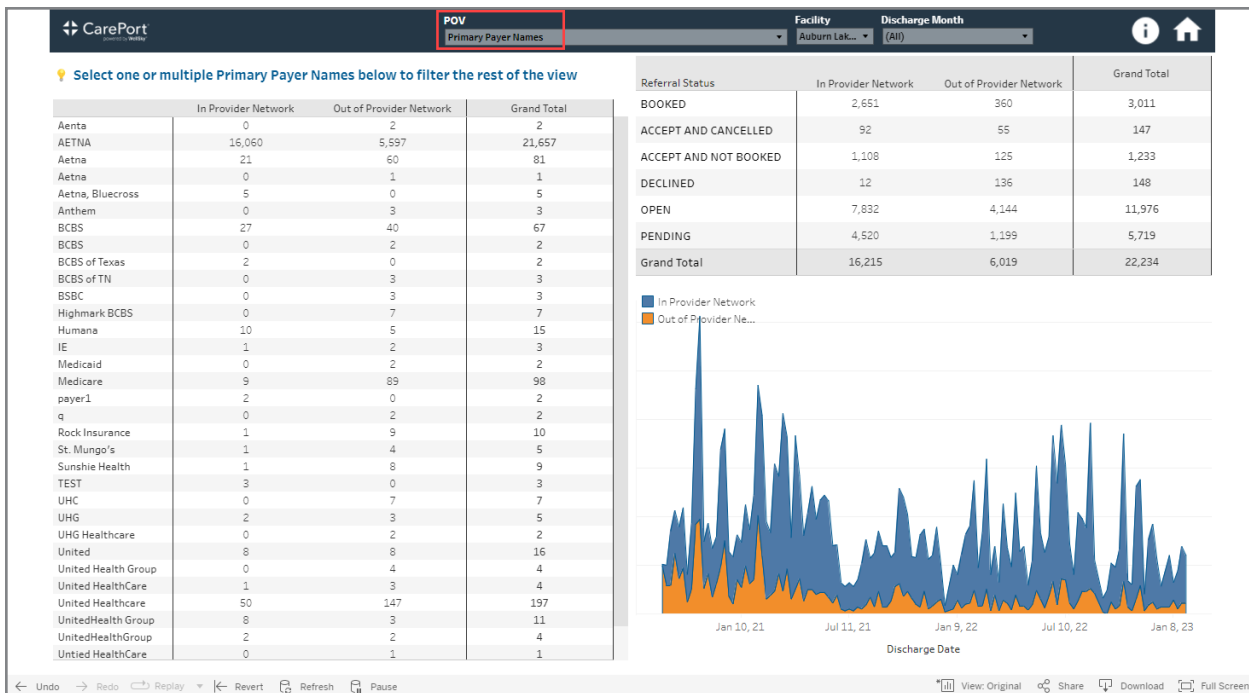
- Multi-select all the facilities or select individually.
- The provider network is created by the individual hospital.
- How many of our referrals were sent to In Provider Networks and how many are sent to Out of Provider Networks?
- A grand total displays per facility basis and per network basis.

Ranking per Facility

The table on the left provides a breakdown of what happened to the referrals.

	In Provider Network	Out of Provider Network	Grand Total
Hospital 1	84	30	114
Hospital 2	80	38	118
Hospital 3	69	28	97
Hospital 5	74	32	106
Grand Total	307	128	435

Within the **POV** drop-down, you can select the **Primary Payer Names** option and see how the numbers of referrals change as well as the graph. The graph at the bottom allows us to see a week-to-week analysis.



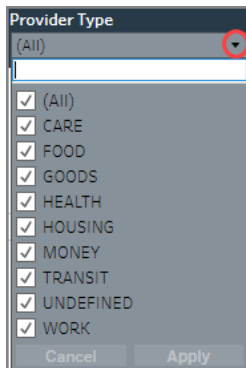
Community Referral Dashboard

Use the **Community Referral** dashboard to view a detailed summary for referrals sent to community-based providers using CarePort Community.

1. Click the [Community Referral](#) link within the Landing Page. The **Community Referral** dashboard header displays.



2. In the **Facility Name** field, select your acute facility(ies) for which to view data.
3. In the **Provider Name** field, select the desired community-based providers.
4. In the **Provider Type** field, select the types of community-based providers from the drop-down menu and click the **Apply** button.



5. In the **View By** field, select one (1) of the options from the drop-down menu.
 - Facility
 - Provider
 - Case Manager
 - Provider Type
6. In the **Most Recent Referral Month** field, select the desired month.
7. In the **Months to View** field, enter the number of months.

Based on your selections, the sections of the dashboard update.

Facility Name: (All)
Provider Name: (All)
Provider Type: (All)
View By: Facility
Most Recent Referral Month: Current Month
Months to View: 3

Find Help Summary by Facility Name

	Referrals	Connected Referrals	Non-Connected Referrals	Avg Connected Resp Min	Avg Non-Connected Resp Min	% Connected Resp	% Non-Connected Resp
Hospital 79	9	6	3		21	0%	33%
Hospital 49	9	3	6	4	4	67%	17%
Hospital 1	9	4	5			0%	0%
Hospital 10	10	8	2			0%	0%
Hospital 100	9	6	3			0%	0%
Hospital 11	10	5	5			0%	0%
Hospital 12	10	6	4			0%	0%
Hospital 13	10	5	5			0%	0%
Hospital 14	10	4	6			0%	0%
Hospital 15	10	4	6	75		25%	0%
--	--	--	--	--	--	--	--

Referral Statuses

NOT UPDATED: 97.83%

NEEDS CLIENT ACTION: 1.41%

NEEDS ACTION: 0.22%

GOT HELP: 0.22%

COULDN'T GET HELP: 0.22%

COULDN'T CONTACT: 0.11%

Find Help Referral Details

Patient Name	DOB	MRN	Referral Sent Date	Case Manager Name	Facility Name	Is Connected	Provider Name
1, Patient	8/15/1947 12:00:00 AM	1163657846	2022-05-08 - 03:21:13	Case Manager 48	Hospital 98	Y	Provider 98
		1163673163	2022-05-19 - 03:22:15	Case Manager 45	Hospital 95	Y	Provider 95
		1163675666	2022-05-20 - 01:15:01	Case Manager 42	Hospital 92	Y	Provider 92
		1163678874	2022-05-21 - 02:23:43	Case Manager 39	Hospital 89	Y	Provider 89
		1163692739	2022-05-26 - 03:31:24	Case Manager 36	Hospital 86	N	Provider 86
		1163721471	2022-06-03 - 09:34:02	Case Manager 33	Hospital 83	N	Provider 83
		1163782463	2022-06-27 - 02:58:45	Case Manager 30	Hospital 80	N	Provider 80
		1163797307	2022-07-01 - 06:41:33	Case Manager 27	Hospital 77	Y	Provider 77
		1163821864	2022-07-14 - 03:09:58	Case Manager 24	Hospital 74	Y	Provider 74
		1163657846	2022-05-08 - 03:09:35	Case Manager 49	Hospital 99	Y	Provider 99
2, Patient	8/15/1947 12:00:00 AM	1163673163	2022-05-19 - 03:10:06	Case Manager 46	Hospital 96	N	Provider 96
		1163675666	2022-05-20 - 01:14:28	Case Manager 43	Hospital 93	N	Provider 93
		1163678863	2022-05-21 - 03:09:40	Case Manager 40	Hospital 90	Y	Provider 90

Include Test Facilities: **False**

Find Help Summary by Provider Type

In the following example, Provider Type was selected in the View By field.

	Referrals	Connected Referrals	Non-Connected Referrals	Avg Connected Resp Min	Avg Non-Connected Resp Min	% Connected Resp	% Non-Connected Resp
FOOD	200.0	3.0	197.0	25.1	12.8	67%	1%
CARE	193.0	193.0	0.0	817.4		1%	
EDUCATION	11.0	0.0	11.0				0%
GOODS	19.0	19.0	0.0			0%	
HEALTH	414.0	222.0	192.0	6.4		0%	0%
HOUSING	22.0	22.0	0.0	12.9		50%	
LEGAL	12.0	12.0	0.0	61.0		8%	
MONEY	18.0	18.0	0.0	0.9		6%	
TRANSIT	23.0	23.0	0.0			0%	
WORK	11.0	11.0	0.0			0%	

The left side of the table lists all the provider types selected for view. For each provider type, the table lists the following information:

- The number of referrals
- The number of those referrals that were Connected (CarePort Intake) or Non-Connected (CarePort QuickCase)
- The average response time in minutes for each Connected or Non-Connected provider type
- The response percentage for each Connected or Non-Connected provider type



NOTE – Clicking a specific provider type changes the data provided in the other two (2) sections of the dashboard.

Referral Statuses

In the following example, **HOUSING** was selected.

Find Help Summary by Provider Type								Referral Statuses	
	Referrals	Connected Referrals	Non-Connected Referrals	Avg Connected Resp Min	Avg Non-Connected Resp Min	% Connected Resp	% Non-Connected Resp	NOT UPDATED	\$0.00%
FOOD	200.0	3.0	197.0	25.1	12.8	67%	1%	NEEDS CLIENT ACTION	\$0.00%
CARE	193.0	193.0	0.0	817.4		1%			
EDUCATION	11.0	0.0	11.0			0%			
GOODS	19.0	19.0	0.0			0%			
HEALTH	41.0	41.0	0.0	6.4		100%	0%		
HOUSING	22.0	22.0	0.0	12.9		50%			
LEGAL	12.0	12.0	0.0	61.0		8%			
MONEY	18.0	18.0	0.0	0.9		6%			
TRANSIT	23.0	23.0	0.0			0%			
WORK	11.0	11.0	0.0			0%			

The **Referral Statuses** section updates for the **HOUSING** provider type.

Find Help Referral Details

With **HOUSING** still selected, the referral details section updates with all the patients who had housing referrals. The patient’s name, date of birth, and MRN are provided.

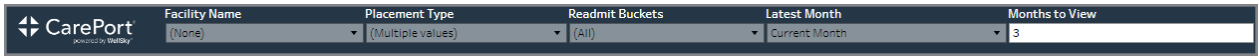
You can also see the date the referral was sent, who the Case Manager was and the Facility from which the referral was sent. Additionally, the provider’s name and whether the provider is Connected or Non-Connected also displays.

Find Help Referral Details								
Patient Name	DOB	MRN	Referral Sent Date	Case Manager Name	Facility Name	Is Connected	Provider Name	
4, Patient	8/15/1947 ..	1163675666	2022-05-20 - 01:09:56	Case Manager 45	Hospital 95	Y	Provider 95	
14, Patient	8/15/1947 ..	1163676237	2022-05-20 - 03:21:51	Case Manager 5	Hospital 5	Y	Provider 5	
15, Patient	8/15/1947 ..	1163822717	2022-07-14 - 06:25:23	Case Manager 38	Hospital 88	Y	Provider 88	
24, Patient	8/15/1947	1163675384	2022-05-19 - 23:23:57	Case Manager 18	Hospital 18	Y	Provider 18	
	12:00:00 AM	1163676186	2022-05-20 - 03:37:44	Case Manager 15	Hospital 15	Y	Provider 15	

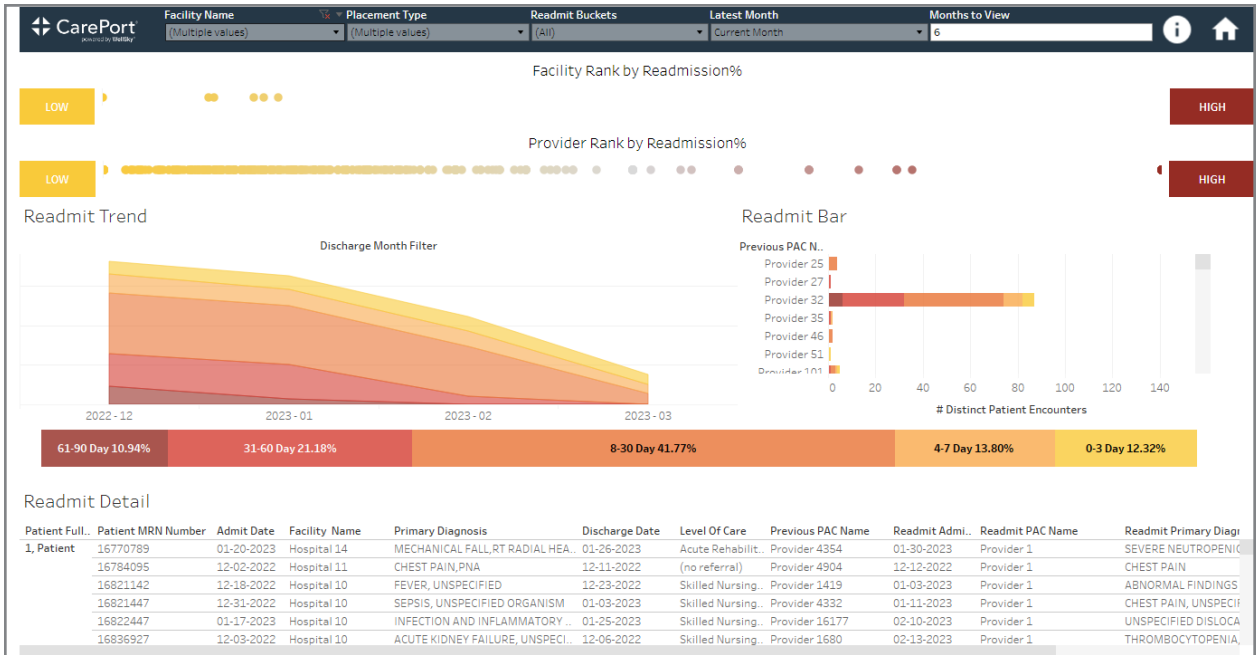
Readmission Analysis Dashboard

This dashboard highlights the readmission trends over time across facilities and post-acute care providers. Previously, the **Placement Type** filter showed multiple values for **Unknown**. Effective April 21, 2022, these values now roll up into a **single** Unknown value.

1. Click the [Readmission Analysis](#) link on the Landing Page. The dashboard header displays.

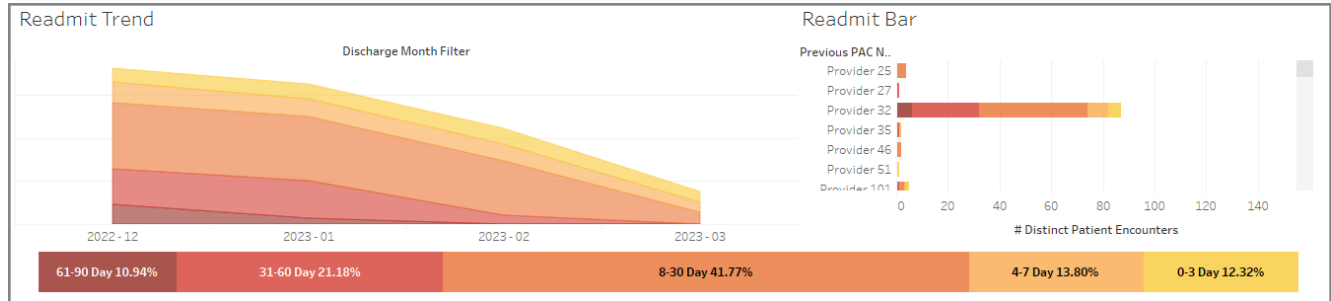


2. Select the desired **Facility(ies)** and click the **Apply** button.
3. Select the desired **Placement Type(s)** and click the **Apply** button.
4. Select the desired **Readmit Buckets**. The default is set to **All**.
5. Select the desired **Latest Month**.
6. Indicate the number of **Months to View**. The dashboard displays results, based on your selections.



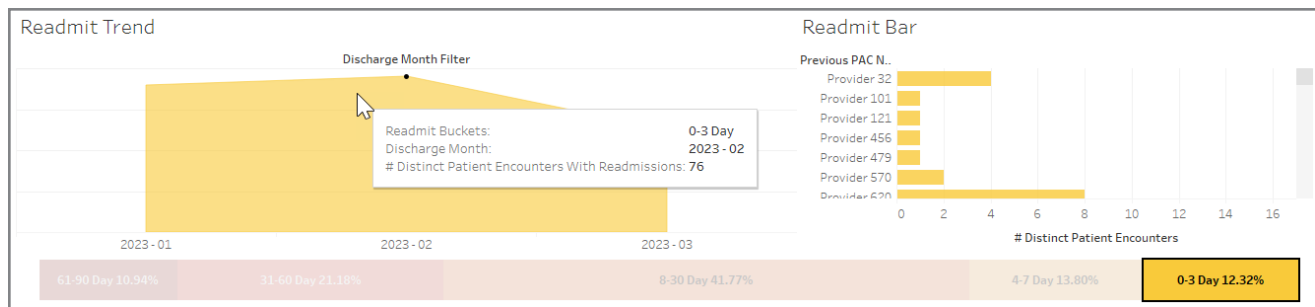
Readmit Trend

The **Readmit Trend** section of this dashboard displays the readmission trends over time, broken out by readmission days between the time the patient was discharged and the time the patient was readmitted.



In the above example, the readmit time frames are color coded, which makes it easy to see how each post-acute care provider performed, based on the number of patient encounters.

Click a specific timeframe (chart color) to see how many patients were discharged from the acute facility and of that number of patients, how many were readmitted.



The above example shows that 76 patients discharged during February 2023 and were readmitted within 0-3 days. The **Readmit Bar** chart to the right displays the post-acute care providers to which the patients were discharged and how many patient encounters for which they were responsible.

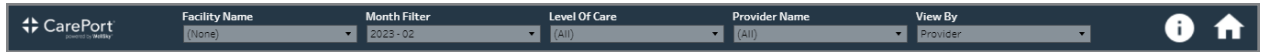
Readmit Detail

The bottom of the dashboard is a data grid that displays each patient readmitted within the filters selected (facilities, providers, months). View readmission performance relative to other hospitals within their system.

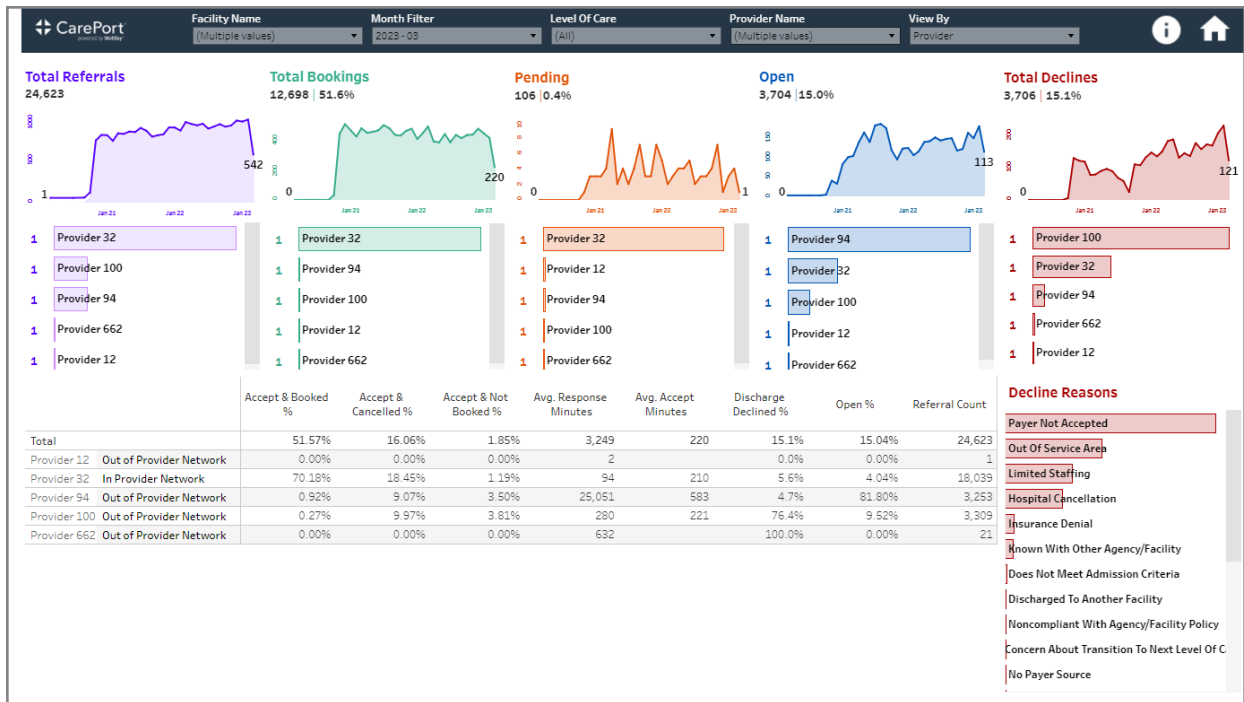
Readmit Detail											
Patient Full.	Patient MRN Number	Admit Date	Facility Name	Primary Diagnosis	Discharge Date	Level Of Care	Previous PAC Name	Readmit Admi.	Readmit PAC Name	Readmit Primary Diagn	
1, Patient	17067429	03-04-2023	Hospital 11	BOWEL/BLADDER INCONTINENCE,...	03-10-2023	(no referral)	Provider 620	03-13-2023	Provider 1	HOMELESS, NONCOMF	
2, Patient	17155656	01-30-2023	Hospital 11	LEFT HIP FRACTURE	02-06-2023	Acute Rehabilit	Provider 1217	02-10-2023	Provider 2	GIB	
3, Patient	17149786	02-25-2023	Hospital 11	UTI, CONFUSION	02-28-2023	(no referral)	Provider 1144	03-02-2023	Provider 3	ACUTE URINARY RETE	
4, Patient	17067561	01-06-2023	Hospital 11	ABD PAIN, PLEURAL EFFUSION	01-30-2023	Skilled Nursing	Provider 620	01-31-2023	Provider 4	DYSPNEA, LIVER CIRRH	
5, Patient	17089128	01-23-2023	Hospital 10	OTHER SPECIFIED PERSONAL RISK..	01-31-2023	(no referral)	Provider 7355	02-02-2023	Provider 5	PAIN, UNSPECIFIED	
	17313195	01-21-2023	Hospital 10	PNEUMOTHORAX, UNSPECIFIED	02-08-2023	Home Health A.	Provider 4290	02-10-2023	Provider 5	SEPSIS, UNSPECIFIED	

Referral Trend Dashboard

1. Click the [Referral Trend](#) link on the Landing Page. The dashboard header displays.



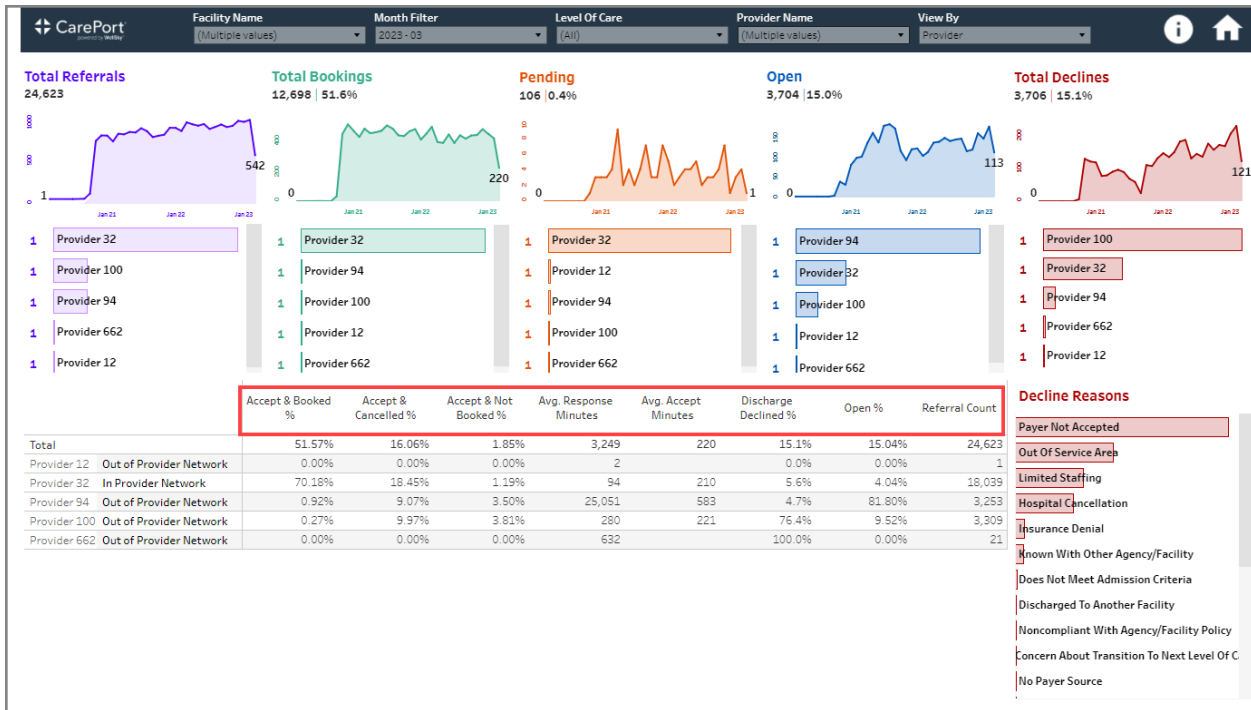
2. Select the desired **Facility Name**(s) and click the **Apply** button.
3. Select the desired **Month Filter**(s) and click the **Apply** button.
4. Select the desired **Level of Care** and click the **Apply** button. The default is set to **All**.
5. Select the desired **Provider Name**(s) and click the **Apply** button. The default is set to **All**.
6. Select the desired **View By** option. The **Provider** option is selected by default. The dashboard displays based on your selected criteria.



The top section of this dashboard displays unique charts, which provide an overview of the following referral statuses:

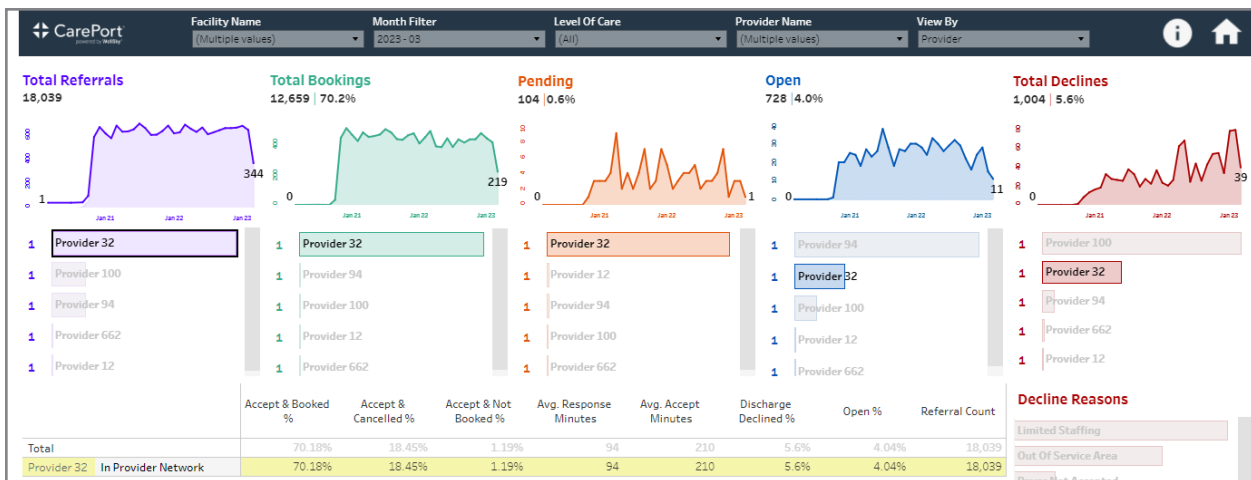
- Month-to-Month performance of **Referrals** and **Bookings**
- Pending
- Open
- Total Declines

If the **Provider** option is selected in the **View by** field, then the unique charts change as well as the detailed table below.



This **Month-to-Month** trend chart displays the top performers (by volume) of each based on the option selected within the **View By** field.

If a specific provider is selected, you can see changes in the individual charts above, as well as the table below.



This allows you to aggregate data across facilities in one (1) dashboard view by selecting desired facilities in the filter rather than refreshing to a new dashboard view for each separate facility.

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4

Single-Facility Discharge Dashboards

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Introduction

These dashboards provide perspectives for specific facilities and how the post-acute care providers are responding to their referrals.

The Single-Facility dashboard contains the following three (3) individual dashboards:

- [Network Summary](#)
- [Patient Details](#)
- [Decline Analysis](#)

Network Summary Dashboard

The **Network Summary** dashboard provides a view of referral information within a provider network and referrals outside of provider networks for a single selected facility. This dashboard provides a summary of referrals for individual facilities by:

- Provider
- Care Level
- Network Status
- Referral Month



NOTE – This dashboard replaces the current dashboard’s area of focus and provides a new snapshot. COVID and BPCI tags are now included.

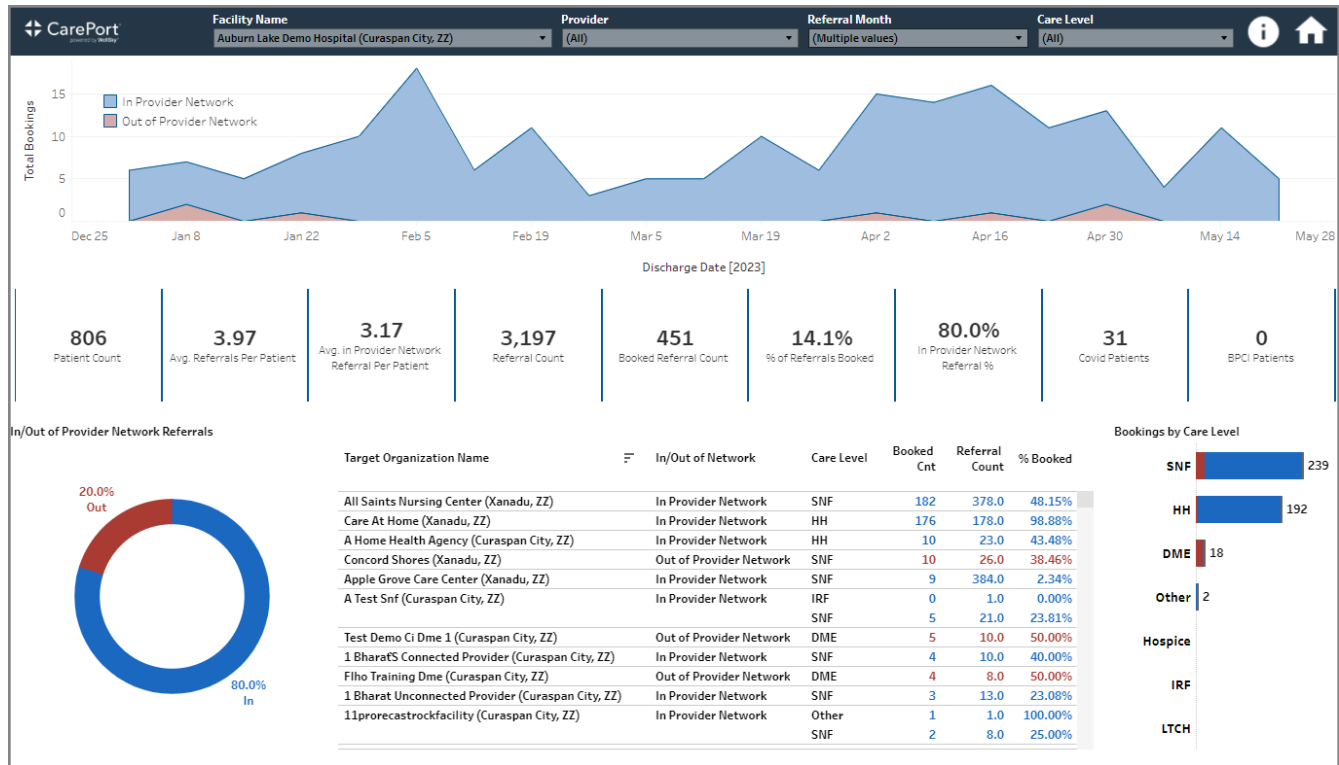
- Orange = Out-of-Network
- Blue = In-Network

1. Click the [Network Summary](#) link on the Landing Page. The dashboard header displays.



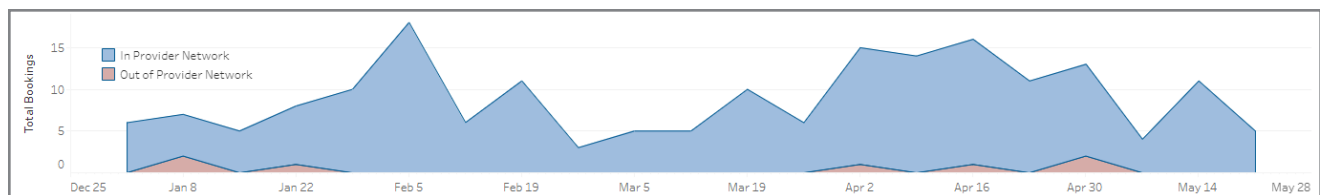
2. Select the appropriate **Facility**.
3. Select the **Provider(s)** and click the **Apply** button. It defaults to **all**.
4. Select the **Referral Month(s)** and click the **Apply** button. It defaults to **all**.
5. Select the desired **Care Level** and click the **Apply** button. It defaults to **all**.

The Network Summary dashboard displays, based on the search criteria.



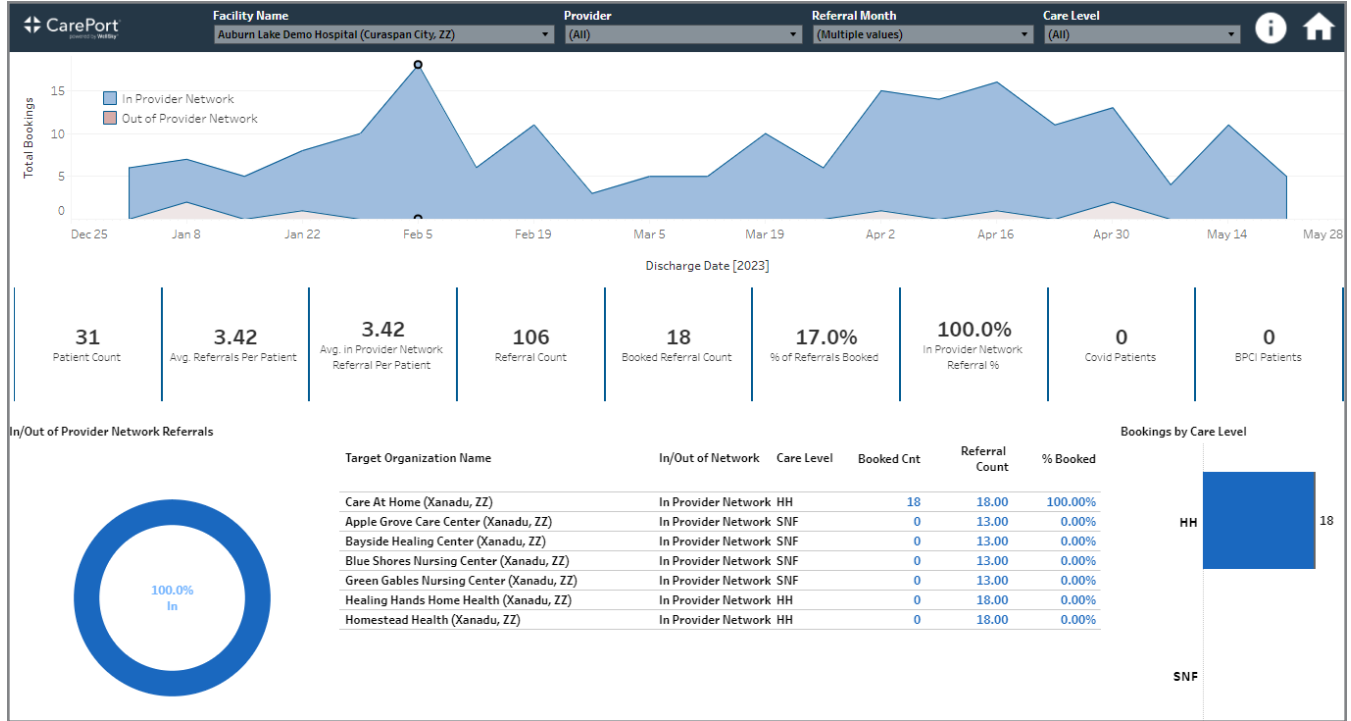
Total Bookings

The top section graphically displays the total number of bookings for Auburn Lake Demo Hospital. Using the color coding, it is easy to determine which of those bookings were **In-Network** and which were **Out-of-Network** trending over time.



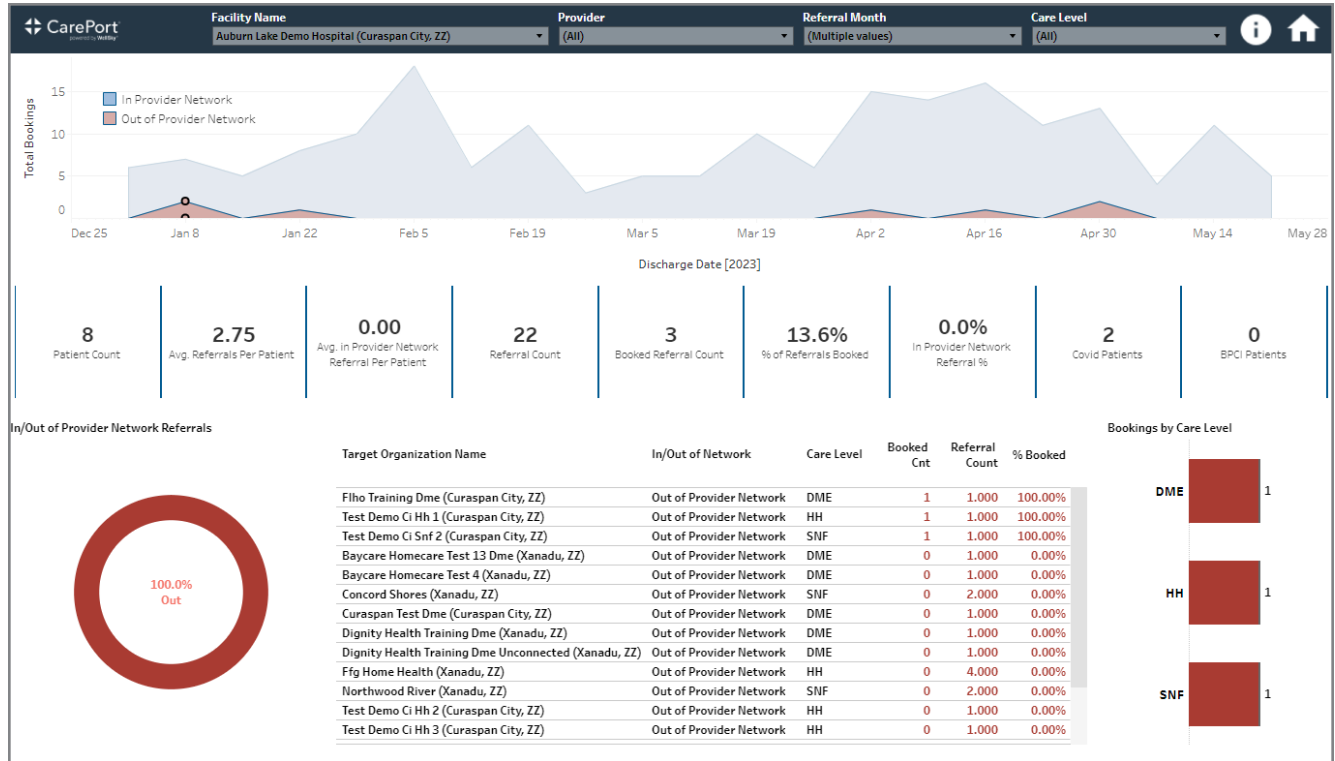
In-Provider Network

If you click the **blue shaded area**, then the data in the table changes for that selected time frame.



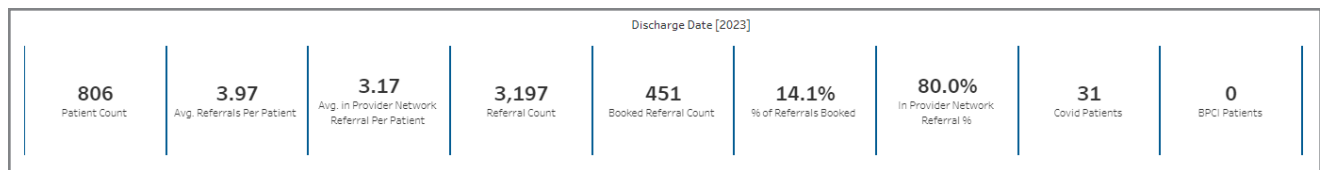
Out of Provider Network

If you click the **red shaded area**, then the data in the table changes for that selected time frame.



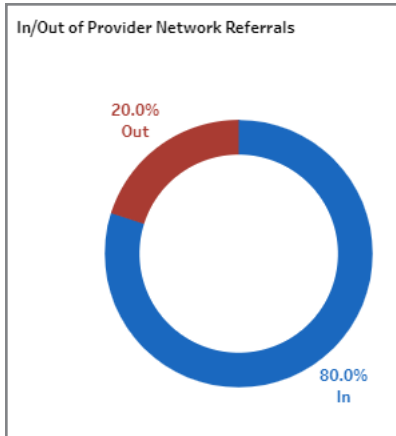
Drill-Down Summary for Referrals %

This section breaks down the **referral count**, **% of referrals Booked**, and the **percentage of referrals** sent to an In-Provider network.



In/Out of Provider Network Referrals – Pie Chart

The pie chart in the bottom left corner displays the percentages of In Network versus Out of Network referrals as well as Booking percentages.



TIP – You can see the percentage amount for In Network, which correlates to the drill-down summary for In Network Referrals %.

Grid Breakdown

In the bottom center is a grid breakdown for each selected provider.

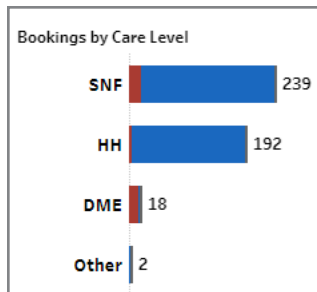
Target Organization Name	In/Out of Network	Care Level	Booked Cnt	Referral Count	% Booked
All Saints Nursing Center (Xanadu, ZZ)	In Provider Network	SNF	182	378.0	48.15%
Care At Home (Xanadu, ZZ)	In Provider Network	HH	176	178.0	98.88%
A Home Health Agency (Curaspan City, ZZ)	In Provider Network	HH	10	23.0	43.48%
Concord Shores (Xanadu, ZZ)	Out of Provider Network	SNF	10	26.0	38.46%
Apple Grove Care Center (Xanadu, ZZ)	In Provider Network	SNF	9	384.0	2.34%
A Test Snf (Curaspan City, ZZ)	In Provider Network	IRF	0	1.0	0.00%
		SNF	5	21.0	23.81%
Test Demo Ci Dme 1 (Curaspan City, ZZ)	Out of Provider Network	DME	5	10.0	50.00%
1 BharatS Connected Provider (Curaspan City, ZZ)	In Provider Network	SNF	4	10.0	40.00%
Filho Training Dme (Curaspan City, ZZ)	Out of Provider Network	DME	4	8.0	50.00%
1 Bharat Unconnected Provider (Curaspan City, ZZ)	In Provider Network	SNF	3	13.0	23.08%
11procastrockfacility (Curaspan City, ZZ)	In Provider Network	Other	1	1.0	100.00%
		SNF	2	8.0	25.00%

The following questions are answered.

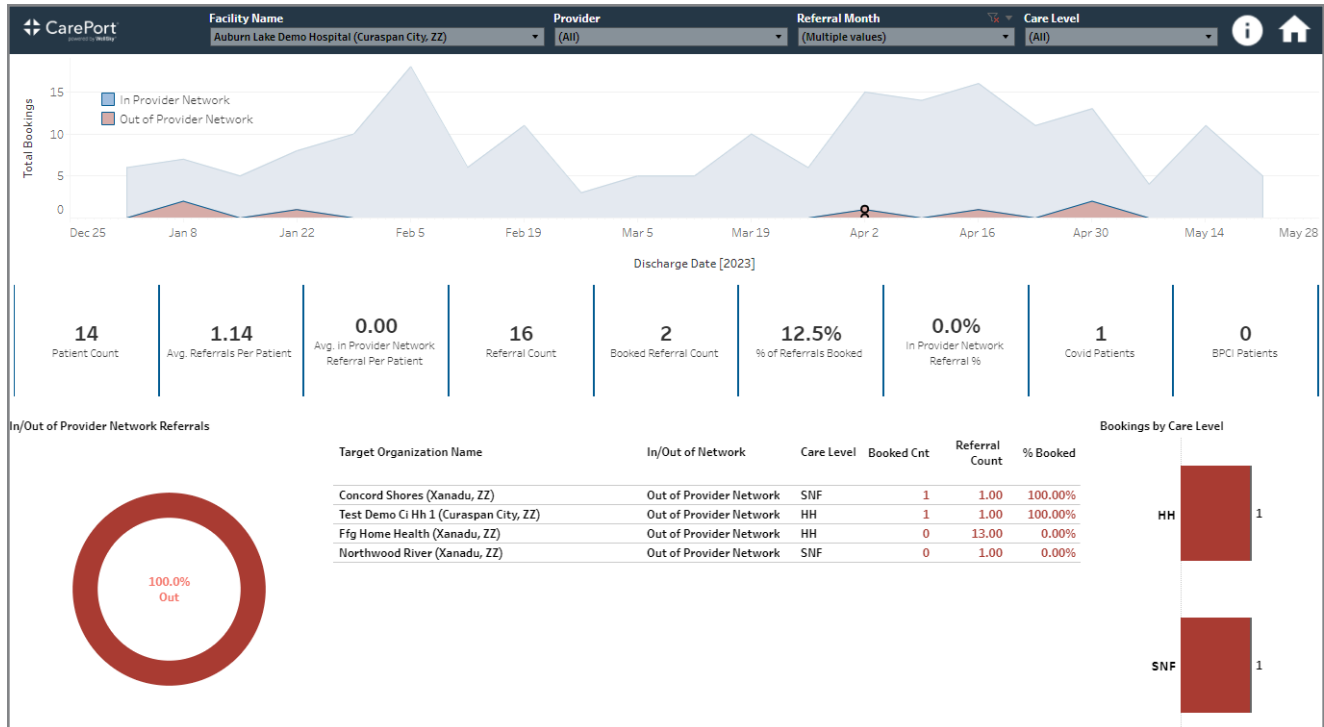
- Are they in or out of network?
- What is their Care Level?
- What is their Referral Count and Booked percentage for each individual provider?

Bookings by Care Level

If you look at the **Bookings by Care Level** chart you can see bookings for SNF, HH, DME, and Other.



Click the **red** section at the top of the screen to break this down a bit further to see which providers are Out-of-Network for the LOCs.



NOTE – If you want to see a particular care level, you can see the **Booked** and **Referral Counts** per the care level.

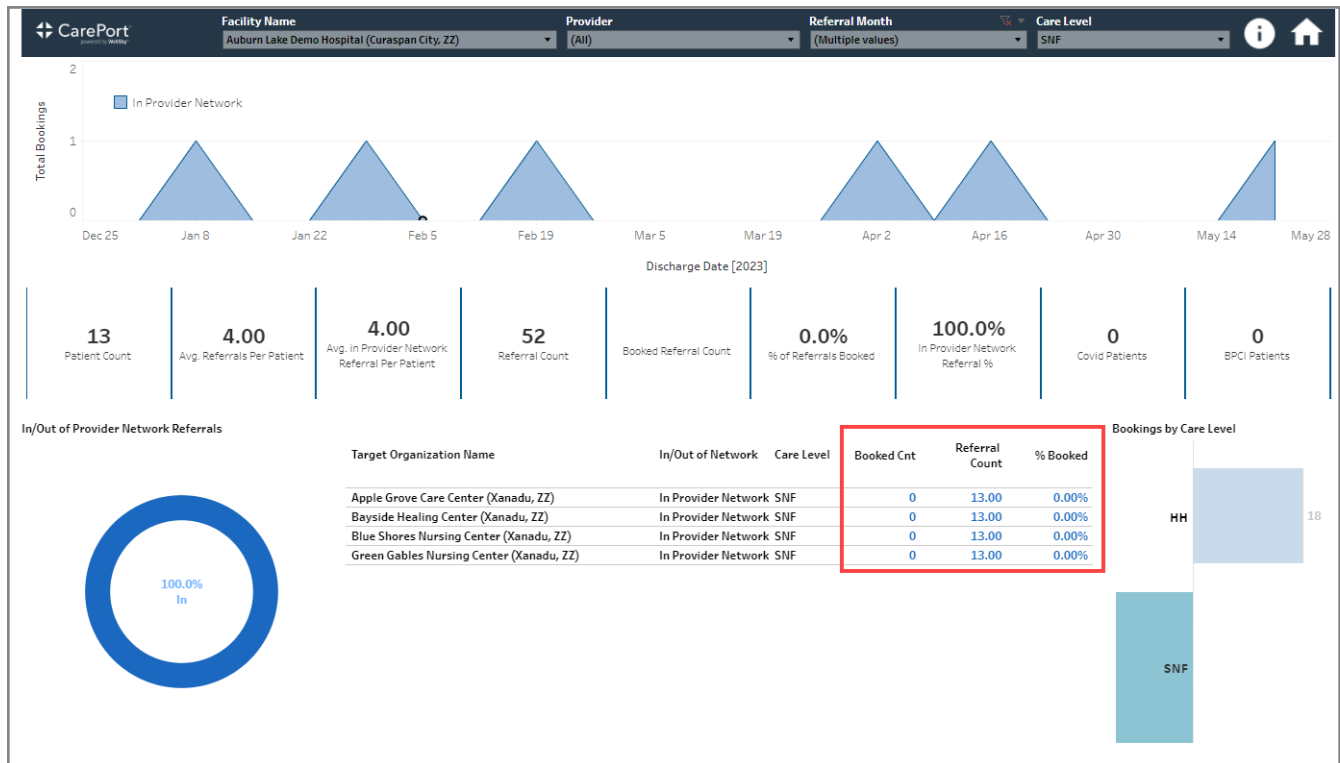
Target Organization Name	In/Out of Network	Care Level	Booked Cnt	Referral Count	% Booked
Concord Shores (Xanadu, ZZ)	Out of Provider Network	SNF	10	26.00	38.46%
Test Demo Ci Snf 1 (Curaspan City, ZZ)	Out of Provider Network	SNF	3	6.00	50.00%
Test Dialyze Direct- A Test Snf (Curaspan City, ZZ)	Out of Provider Network	SNF	3	6.00	50.00%
Pine Woods Skilled Nursing (Xanadu, ZZ)	Out of Provider Network	SNF	1	1.00	100.00%
Test Demo Ci Snf 2 (Curaspan City, ZZ)	Out of Provider Network	SNF	1	5.00	20.00%
Test Demo Ci Snf 4 (Curaspan City, ZZ)	Out of Provider Network	SNF	1	3.00	33.33%
Test Demo Ci Snf 5 (Curaspan City, ZZ)	Out of Provider Network	SNF	1	1.00	100.00%
I Transport Hospital (Curaspan City, ZZ)	Out of Provider Network	SNF	0	1.00	0.00%
11protractor_Intake_With_Discharge (Curaspan City, ZZ)	Out of Provider Network	SNF	0	1.00	0.00%
A New Test Snf (Curaspan City, ZZ)	Out of Provider Network	SNF	0	5.00	0.00%
A New Test Test (Curaspan City, ZZ)	Out of Provider Network	SNF	0	2.00	0.00%
Abc Demo Providers (Curaspan City, ZZ)	Out of Provider Network	SNF	0	2.00	0.00%
Abc Test Skilled Nursing (Curaspan City, ZZ)	Out of Provider Network	SNF	0	5.00	0.00%

Click the **blue** section at the top of the screen to view the data for all your In-Network providers.

Target Organization Name	In/Out of Network	Care Level	Booked Cnt	Referral Count	% Booked
Care At Home (Xanadu, ZZ)	In Provider Network	HH	18	18.00	100.00%
Apple Grove Care Center (Xanadu, ZZ)	In Provider Network	SNF	0	13.00	0.00%
Bayside Healing Center (Xanadu, ZZ)	In Provider Network	SNF	0	13.00	0.00%
Blue Shores Nursing Center (Xanadu, ZZ)	In Provider Network	SNF	0	13.00	0.00%
Green Gables Nursing Center (Xanadu, ZZ)	In Provider Network	SNF	0	13.00	0.00%
Healing Hands Home Health (Xanadu, ZZ)	In Provider Network	HH	0	18.00	0.00%
Homestead Health (Xanadu, ZZ)	In Provider Network	HH	0	18.00	0.00%

If you click a specific care level within the **Bookings by Care Level**, you can see the following:

- Booked Count
- Referral Count
- Percentage Conversion Rate



From here you can:

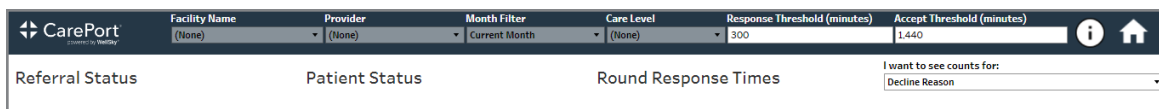
- View a high-level scan.
- Identify the good and bad outliers and drill-down on them.

Patient Details Dashboard

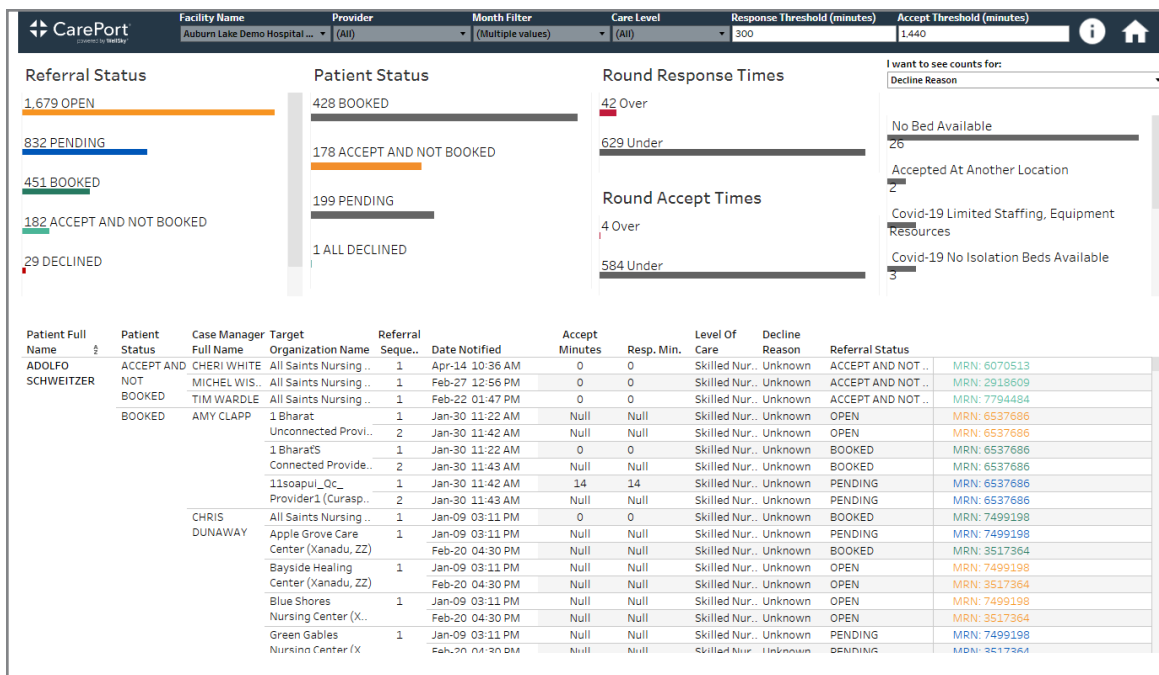
This dashboard provides an analysis of patients at a specified facility. You can view details of patient encounters by the following:

- Referral Status
- Patient Status
- Response Times
- Accept Times
- Decline Reasons

1. Click the [Patient Details](#) link on the Landing Page. The dashboard header displays.



2. Select the Facility Name.
3. Select the Provider(s). The default is All.
4. Select the Month Filter.
5. Select the Care Level. The default is All.
6. Enter the Response Threshold (minutes). The default is 300.
7. Enter the Accept Threshold (minutes). The default is 1,440. The dashboard displays results.



Round Response Times

Click the **red** line within the **Round Response Times** section to see which post-acute care providers are **not** responding within the first 300 minutes.



NOTE – The **Response Threshold** time can be set by the user. The default is 300 minutes.

The table below changes with the selection.

CarePort
Facility Name: Auburn Lake Demo Hospital ...
Provider: (All)
Month Filter: (Multiple values)
Care Level: (All)
Response Threshold (minutes): 300
Accept Threshold (minutes): 1,440

Referral Status

24 OPEN

7 BOOKED

4 DECLINED

1 ACCEPT AND NOT BOOKED

Patient Status

13 BOOKED

3 ACCEPT AND NOT BOOKED

3 PENDING

Round Response Times

42 Over

629 Under

Round Accept Times

3 Over

2 Under

I want to see counts for:

Decline Reason

No Bed Available: 4

Patient Full Name	Patient Status	Case Manag.	Target Organization Name	Referral Sequen..	Date Notified	Accept Minutes	Resp. Min.	Level Of Care	Decline Reason	Referral Status	MRN
ANGEL CHIGER	BOOKED	CHRIS	Concord Shores (X...	1	Apr-03 12:34 PM	1439	1426	Skilled Nur...	Unknown	BOOKED	MRN: 31687431543654354
			Northwood River (...)	1	Apr-03 12:34 PM	Null	1426	Skilled Nur...	No Bed Av..	DECLINED	MRN: 31687431543654354
APRIL SHOWERS	BOOKED	CHRIS	Concord Shores (X...	1	Apr-19 10:10 AM	1643	1629	Skilled Nur...	Unknown	BOOKED	MRN: 238713571654
			Northwood River (...)	1	Apr-19 10:10 AM	Null	1629	Skilled Nur...	No Bed Av..	DECLINED	MRN: 238713571654
CUPID VALENTINO	BOOKED	CHRIS	Concord Shores (X...	1	Feb-13 12:15 PM	1515	1502	Skilled Nur...	Unknown	BOOKED	MRN: 238731554
			Northwood River (...)	1	Feb-13 12:15 PM	Null	1502	Skilled Nur...	No Bed Av..	DECLINED	MRN: 238731554
DAISEY GAGNON	BOOKED	AMY CLAPP	Test Demo Ci Snf 1...	1	Jan-19 10:07 AM	Null	8781	Skilled Nur...	Unknown	BOOKED	MRN: 3489159
			Test Demo Ci Snf 2...	1	Jan-19 10:07 AM	Null	8781	Skilled Nur...	Unknown	OPEN	MRN: 3489159
			Test Demo Ci Snf 3...	1	Jan-19 10:07 AM	Null	8781	Skilled Nur...	Unknown	OPEN	MRN: 3489159
			Test Demo Ci Snf 4...	1	Jan-19 10:07 AM	Null	10439	Skilled Nur...	Unknown	OPEN	MRN: 3489159
		MICHEL	Concord Shores (X...	1	Feb-27 02:25 PM	Null	1183	Skilled Nur...	Unknown	OPEN	MRN: 3557455
GENERVA POTT..	ACCEPT AN..	KAT	Crane'S Mill Senio...	1	May-19 02:13 PM	Null	4077	Assisted Li...	Unknown	OPEN	MRN: 123987
GERRY SCARBOROUGH	BOOKED	LYNNE	Test Demo Ci Dme ...	1	Apr-19 11:58 AM	Null	1268	DME Suppl...	Unknown	BOOKED	MRN: 9153461
			Test Demo Ci Dme ...	1	Apr-19 11:58 AM	Null	1268	DME Suppl...	Unknown	OPEN	MRN: 9153461
		MICHEL	Test Demo Ci Dme ...	2	Feb-01 12:54 PM	Null	2773	DME Suppl...	Unknown	BOOKED	MRN: 7773931
			Test Demo Ci Dme ...	1	Feb-01 09:52 AM	Null	2954	DME Suppl...	Unknown	OPEN	MRN: 7773931
	PENDING	IRINA	Concord Shores (X...	2	Jan-20 04:18 PM	Null	20036	Skilled Nur...	Unknown	OPEN	MRN: 7760680
JANE DONLAD	BOOKED	CAMANTIA	Test Demo Ci Dme ...	1	Jan-06 12:00 PM	Null	1266	Skilled Nur...	Unknown	OPEN	MRN: 7744032

Round Accept Times

Click the **red** line within the **Round Accept Times** section to see which post-acute care providers are not accepting within the first 1440 minutes.

Then, you can look at the patient and determine the following:

- What is the **Patient Status**?
- Who is their **Case Manager**?
- Who is the **Provider** to which we are sending this referral?
- What **Round** is it?
- What **date** did we **notify** the post-acute care provider?

Referral Status

3 BOOKED

Patient Status

3 BOOKED

Round Response Times

3 Over

1 Under

I want to see counts for:

Decline Reason

Round Accept Times

3 Over

2 Under

Patient Full Name	Patient Status	Case Manager Full Name	Target Organization Name	Referral Sequen..	Date Notified	Accept Minutes	Resp. Min.	Level Of Care	Decline Reason	Referral Status	MRN
APRIL SHOWERS	BOOKED	CHRIS [REDACTED]	Concord Shores (X...	1	Apr-19 10:10 AM	1643	1629	Skilled Nur..	Unknown	BOOKED	MRN: 238713571654
CUPID VALENTI...	BOOKED	CHRIS [REDACTED]	Concord Shores (X...	1	Feb-13 12:15 PM	1515	1502	Skilled Nur..	Unknown	BOOKED	MRN: 238731554
WALTER WINTER	BOOKED	CHRIS [REDACTED]	Concord Shores (X...	1	Jan-18 12:18 PM	1451	1439	Skilled Nur..	Unknown	BOOKED	MRN: 61713857657357



NOTE – A **Referral Round** begins either when the facility sends the initial notification of a referral or when the facility closes and re-opens a referral.

Within each Round, **Response Time** is measured from the beginning of the round to the point the post-acute care provider acknowledges the referral by setting its status to (No Response Submitted, Received, Accepted, etc.).

Accept Times are measured from the beginning of the **Referral Round** until the point the referral is accepted by the post-acute care provider.

Round One Example

In the following example, the hospital notified the post-acute care provider and then immediately **cancelled** the referral.

Patient Full Name	Patient Status	Case Manag..	Target Organization ..	Referral Seque..	Date Notified	Accept Minutes	Resp. Min.	Level Of Care	Decline Reason	Referral Status
PENDING	IRINA		All Saints Nursing ..	1	Apr-26 07:52 AM	0	0	Skilled Nur..	Unknown	ACCEPT AND CANCEL
			Healing Hands	1	May-01 02:08 PM	Null	Null	Home Heal..	Unknown	PENDING
			Home Health (Xan..	2	May-01 02:10 PM	Null	Null	Home Heal..	Unknown	PENDING
			Green Gables Nursing Center (Xanadu, ZZ)	1	Apr-26 07:52 AM	Null	Null	Skilled Nur..	Unknown	PENDING
				2	May-02 02:43 PM	Null	Null	Skilled Nur..	Unknown	PENDING
				3	May-03 11:40 AM	0	0	Skilled Nur..	Unknown	PENDING
				4	May-03 11:41 AM	Null	Null	Skilled Nur..	Unknown	PENDING
			Blue Shores Nursi..	1	Apr-26 07:52 AM	Null	Null	Skilled Nur..	Unknown	OPEN
			Bayside Healing C..	1	Apr-26 07:52 AM	Null	Null	Skilled Nur..	Unknown	OPEN
			Baycare Homecare	1	May-01 02:08 PM	Null	Null	Home Heal..	Unknown	OPEN
			Test 1 (Xanadu, ZZ)	2	May-01 02:10 PM	Null	Null	Home Heal..	Unknown	OPEN
			Apple Grove Care ..	1	Apr-26 07:52 AM	Null	Null	Skilled Nur..	Unknown	PENDING
Another Navihealt..	1	May-01 02:08 PM	Null	Null	Home Heal..	Unknown	OPEN			

MRN: 3734773

ADOLFO SCHWEITZER Born: 4/26/1940

D94

Referral History

HOSPITAL - NOTIFIED Apr-26 12:52 PM

HOSPITAL - CANCELLED Apr-26 12:52 PM

Round Two Example

In the following example, the hospital **re-opened** the cancelled referral.

Patient Full Name	Patient Status	Case Manag..	Target Organization ..	Referral Seque..	Date Notified	Accept Minutes	Resp. Min.	Level Of Care	Decline Reason	Referral Status
PENDING	IRINA		All Saints Nursing ..	1	Apr-26 07:52 AM	0	0	Skilled Nur..	Unknown	ACCEPT AND CANCEL
			Healing Hands	1	May-01 02:08 PM	Null	Null	Home Heal..	Unknown	PENDING
			Home Health (Xan..	2	May-01 02:10 PM	Null	Null	Home Heal..	Unknown	PENDING
			Green Gables Nursing Center (Xanadu, ZZ)	1	Apr-26 07:52 AM	Null	Null	Skilled Nur..	Unknown	PENDING
				2	May-02 02:43 PM	Null	Null	Skilled Nur..	Unknown	PENDING
				3	May-03 11:40 AM	0	0	Skilled Nur..	Unknown	PENDING
				4	May-03 11:41 AM	Null	Null	Skilled Nur..	Unknown	PENDING
			Blue Shores Nursi..	1	Apr-26 07:52 AM	Null	Null	Skilled Nur..	Unknown	OPEN
			Bayside Healing C..	1	Apr-26 07:52 AM	Null	Null	Skilled Nur..	Unknown	OPEN
			Baycare Homecare	1	May-01 02:08 PM	Null	Null	Home Heal..	Unknown	OPEN
			Test 1 (Xanadu, ZZ)	2	May-01 02:10 PM	Null	Null	Home Heal..	Unknown	OPEN
			Apple Grove Care ..	1	Apr-26 07:52 AM	Null	Null	Skilled Nur..	Unknown	PENDING
Another Navihealt..	1	May-01 02:08 PM	Null	Null	Home Heal..	Unknown	OPEN			
MICHEL			Green Gables	1	Jan-23 09:29 AM	Null	Null	Skilled Nur..	Unknown	PENDING

MRN: 3734773

ADOLFO SCHWEITZER Born: 4/26/1940

D94

Referral History

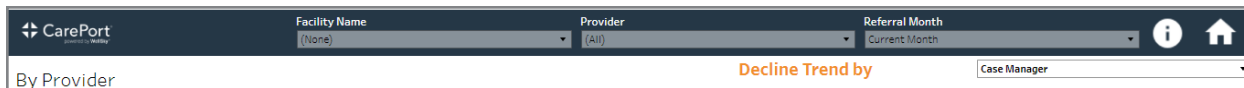
HOSPITAL - REOPEN_REFERRAL May-02 07:43 PM

HOSPITAL - CANCELLED May-03 04:40 PM

Decline Analysis Dashboard

This dashboard displays various forms of analysis for post-acute care provider **declines** received by one (1) hospital.

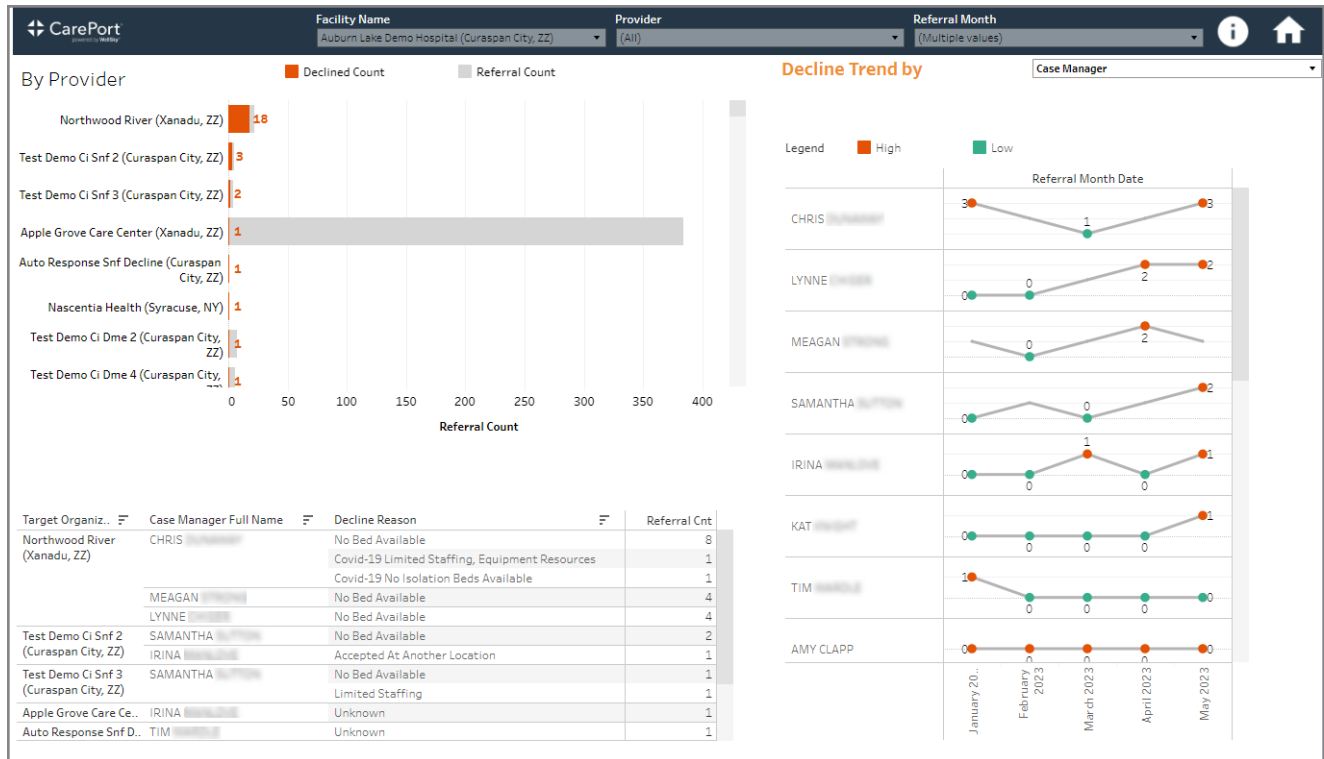
1. Click the [Decline Analysis](#) link on the Landing Page. The dashboard header displays.



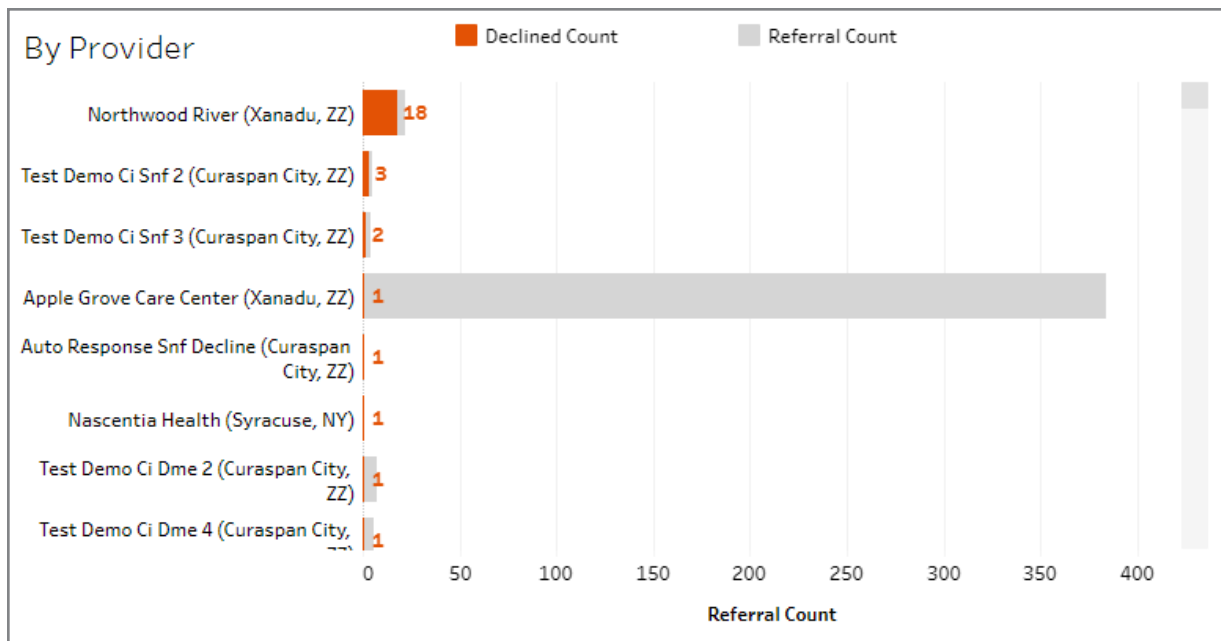
The screenshot shows the CarePort dashboard header. It includes the CarePort logo on the left. To the right, there are three dropdown menus: 'Facility Name' with '(None)' selected, 'Provider' with '(All)' selected, and 'Referral Month' with 'Current Month' selected. Further right are an information icon (i) and a home icon (house). Below these is a 'Decline Trend by' field with a dropdown menu currently showing 'Case Manager'.

2. Select the desired **Facility Name** (hospital).
3. Select the desired **Provider(s)**.
4. Select the desired **Referral Month(s)**.
5. In the **Decline Trend by** field, select one (1) of the following perspective options.
 - Provider
 - Case Manager (default selection)
 - Decline Reason
 - Payer
 - Payer Name

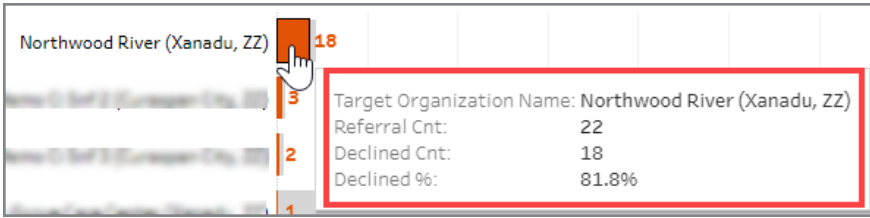
The Decline Analysis dashboard displays.



The graph in the upper left-hand corner displays the **total volume of referrals** sent to each post-acute care provider (**gray**) for the selected facility. Additionally, it displays the volume of how many of those referrals were **declined** (**red**).



Hover over a graph line to see what percentage of referrals were declined by the specific provider.



A trend chart displays within the right side, which displays the Month-over-Month volume of declines with metrics at the lowest and highest point.



The bottom table displays the volume of declines as well as the reasons for the declines per each of these drop-down options. This allows you to see if there is an **outlier** of decline reasons for a specific provider or to that provider.

Target Organiz..	Case Manager Full Name	Decline Reason	Referral Cnt
Northwood River (Xanadu, ZZ)	CHRIS	No Bed Available	8
		Covid-19 Limited Staffing, Equipment Resources	1
		Covid-19 No Isolation Beds Available	1
	MEAGAN	No Bed Available	4
	LYNNE	No Bed Available	4
Test Demo Ci Snf 2 (Curaspan City, ZZ)	SAMANTHA	No Bed Available	2
	IRINA	Accepted At Another Location	1
Test Demo Ci Snf 3 (Curaspan City, ZZ)	SAMANTHA	No Bed Available	1
		Limited Staffing	1
Apple Grove Care Ce..	IRINA	Unknown	1
Auto Response Snf D..	TIM	Unknown	1

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Hospital Operations Reports

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Introduction

Hospital Operations reports are a standard offering within **CarePort Discharge**. The starting date and ending date parameters for the Hospital Operations reports only include dates within the past 25 months.

 **NOTE** – Data older than 25 months is archived.

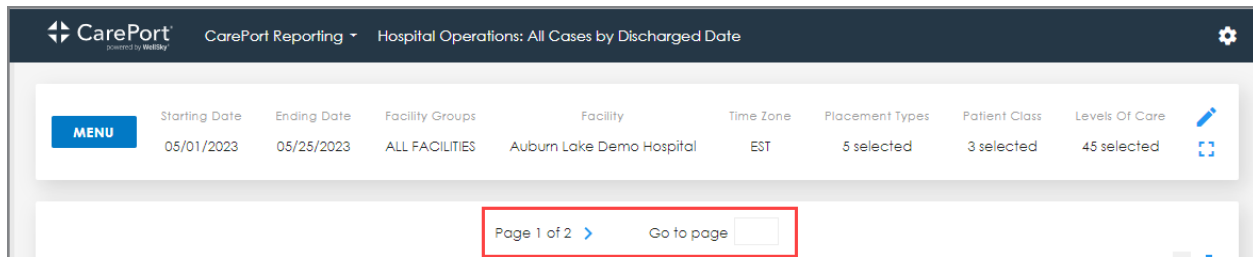
Pagination

The top section of the report displays how many pages contained in the report.

Click the **next page** > icon to access the next page of the report.

OR

Click inside the **Go to Page** field and enter the page number you wish to view.



Parameters

This section displays all the criteria entered for running the report.








Facility Groups:	ALL FACILITIES
Facilities :	Auburn Lake Demo Hospital
Patient Class :	EMERGENCY, Inpatient, Outpatient
Placement Types :	FACILITY, HOME, HOME CARE, OTHER, TRANSFER, UNKNOWN -unknown-
Levels Of Care :	-not available-, -unknown-, Acute Care, Acute Care / Pediatric, Acute Care / Tertiary, Acute Rehabilitation Facility (hospital or unit) (IRF), Adult Day Care, Assisted Living, Behavioral Health, Chronic Care, Clinic, Clinical Programs, Community Services, Critical Access Hospital, DME / Ambulatory, DME Supplier, Dialysis, Dialysis (in SNF), Group Home, Home Based Medical Care, Home Care / Non-Medical, Home Health Agency, Hospice / Home, Hospice / Inpatient, Infusion, Infusion / Home, Inpatient Behavioral Health, Inpatient Substance Abuse, Intermediate Care Facility (ICF), Long Term Care Hospital (LTCH), Outpatient Clinic, Payer, Payer Navigator, Placement Agency, Psychiatric Hospital or Unit, Rehab / Clinic, Residential Care Homes, SNF / Chronic, SNF / Long Term Care, SNF / Rehab, Shelter, Skilled Nursing Facility (SNF), Substance Abuse, Swing Bed / Hospital, Transport

Glossary

This section displays all fields within the report and their descriptions.

Glossary: All Cases Category	
Start and End Date	The start and end date is based on discharge date.
Accept Date	The date on which the patient was accepted by the post-acute provider.
Accept Time (Time Zone)	The time at which the patient was accepted by the post-acute provider (in the time zone you specify as a report parameter).
Admission Date	The patient's actual admit date received via the ADT interface from the hospital information system (HIS).
Admit Type	The type of patient admission. Possible values include - but are not limited to - Routine, Emergency, Scheduled, Urgent and Newborn.
Acute Transfer From?	need to be added
Acute Transfer To?	need to be added
Attending Physician	The physician responsible for the care and diagnosis of a patient during an episode of care.
Booked Date	The date on which the patient was booked with the post-acute provider.
Booked Time (Time Zone)	The time at which the patient was booked with the post-acute provider (in the time zone you specify as a report parameter).
Booking Made Flag?	Indicates whether a referral made to a specific post-acute provider was booked. Possible values are "Yes" and "No." "Yes" will be shown when the case was booked with the post-acute provider.

Table 5-1: Report Icons

Icon	Description	Steps
	Edit	Click to edit the report parameters.
	Enter Full Screen	<ul style="list-style-type: none"> Click to enter full screen mode. Click again to exit full screen mode.
	Back	Click to go back a page within the report.
	Display (Graph or Data)	<ul style="list-style-type: none"> Click to display a graph. Click again to display data.
	Export	Click to export the data to either of the following options: Excel or CSV.
	Favorite this report	<ul style="list-style-type: none"> Click to designate the report as a favorite. The Favorite This Report window displays. <div data-bbox="581 884 1211 1115" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between;"> Favorite This Report × </div> <p><small>Name of Report</small> 2023 May Cases in Progress by Case Statu 40/40</p> <p><input checked="" type="checkbox"/> Remember start and end dates</p> <p style="text-align: right;">NO ADD TO FAVORITE REPORTS</p> </div> Enter the name of the report and click the ADD TO FAVORITE REPORTS button.  If desired, select the check box to Remember start and end dates.

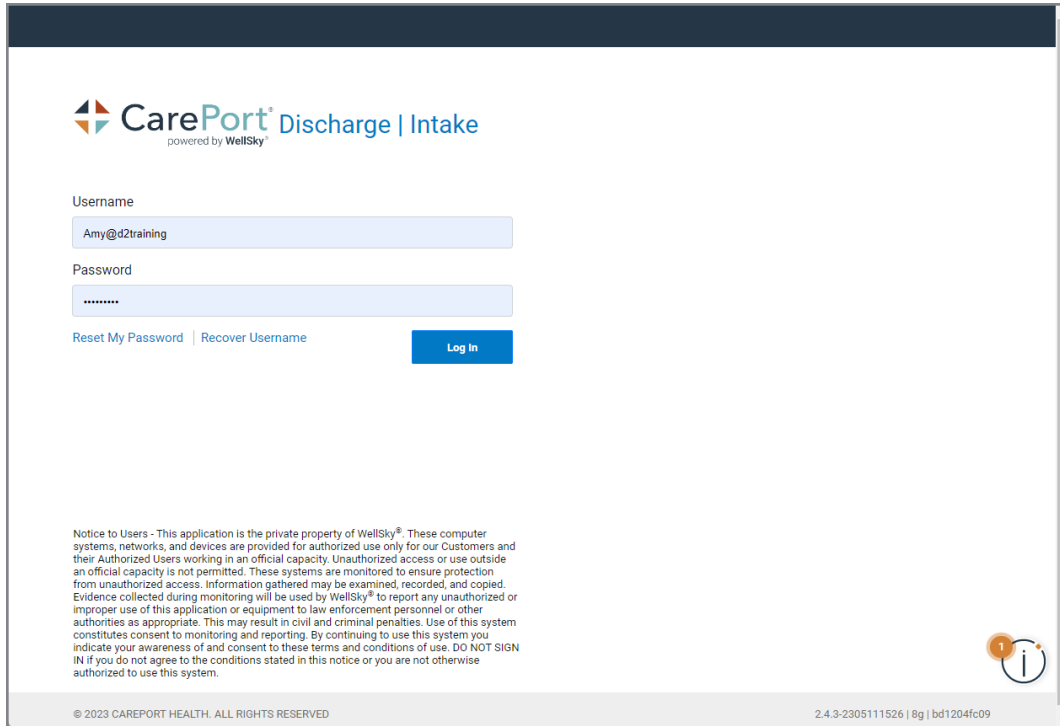


Accessing Hospital Operations Reports

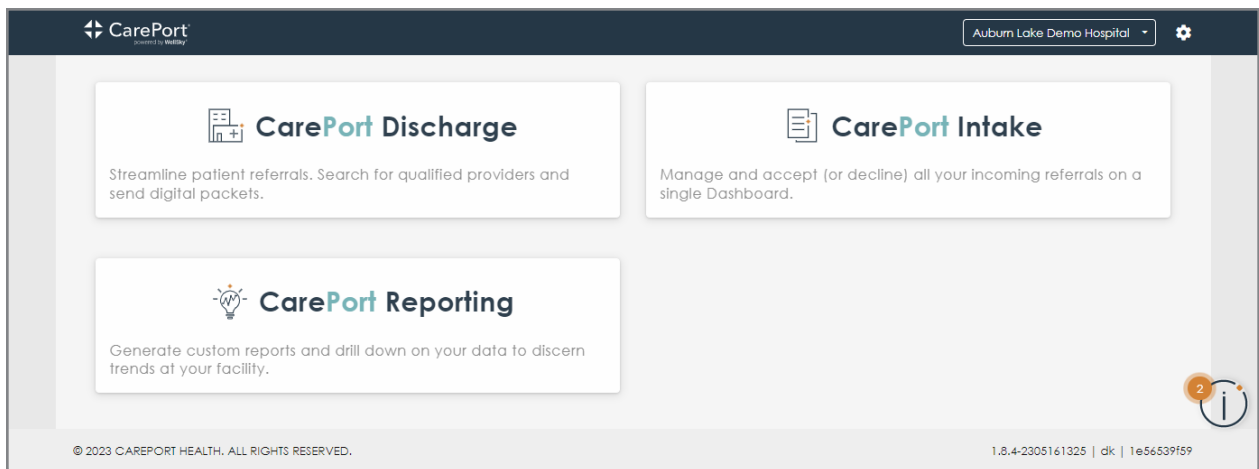
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Introduction

1. Open your web browser and enter the following into the address bar:
<https://network.curaspan.com/connect/commonservices>. The **Login** screen displays.

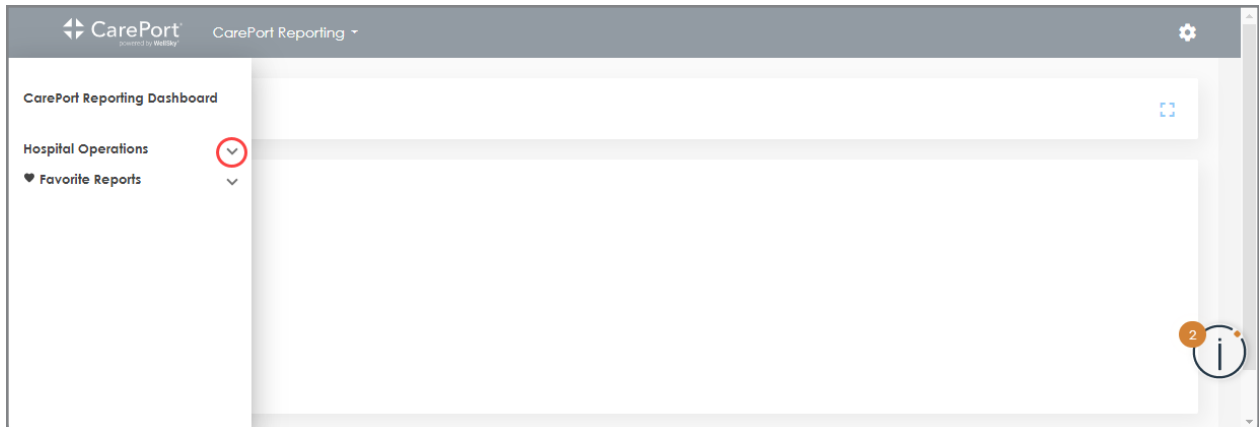


2. Enter your username and password in the respective fields.
3. Click the **Log In** button. The following screen displays.

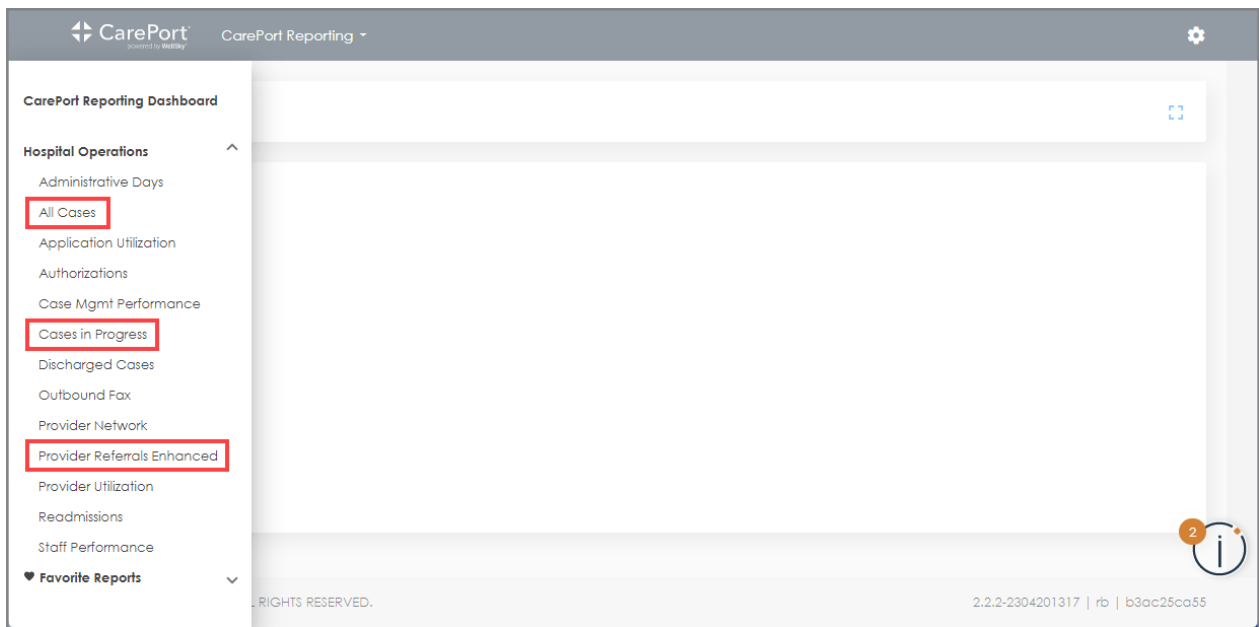


4. Click the **CarePort Reporting** tile.

The CarePort Reporting screen displays.



5. Click the **expand** icon to the right of the **Hospital Operations** option .The available reports within **Hospital Operations** display.



The following three (3) reports are run most often.

- [All Cases](#)
- [Cases in Progress](#)
- [Provider Referrals Enhanced](#)

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All Cases Report

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Introduction

Effective April 28, 2022, the **All Cases Report** has two (2) new columns related to the **Medically Ready** tag:

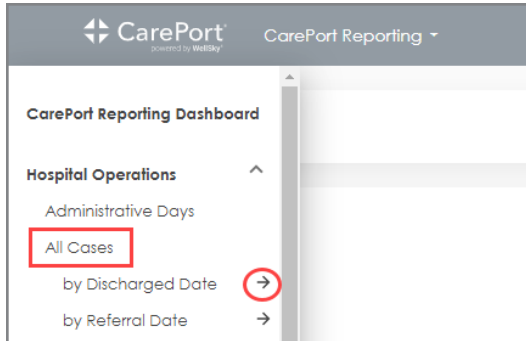
- Medically Ready Date
- Medically Ready Days

There are two (2) options for this report:

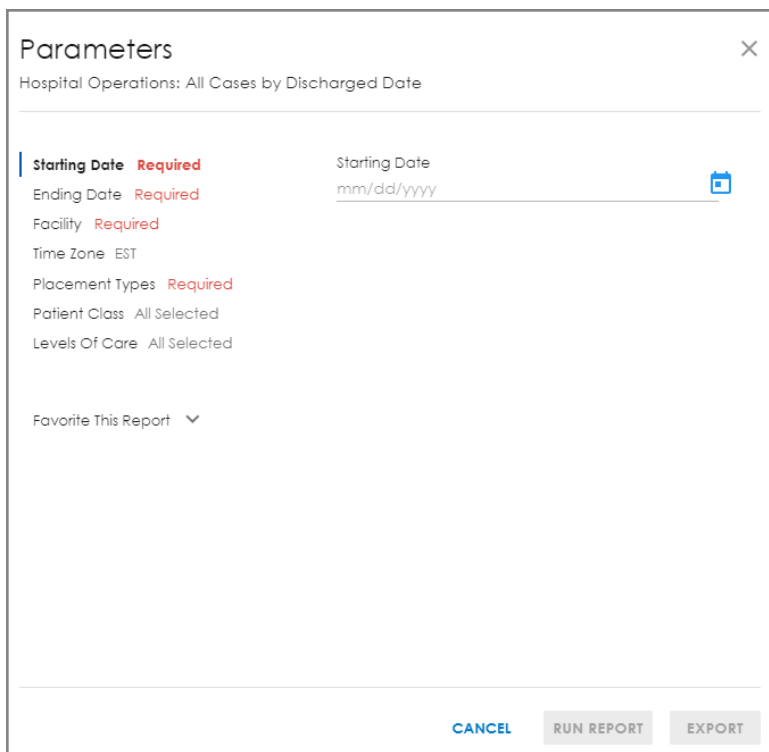
Option	Description
by Discharge Date	This option displays patient information by their discharge date, such as: <ul style="list-style-type: none"> • Primary Contact • Patient Demographics • Payer • Diagnosis • Discharge Disposition • Placement Type • LOC • Provider information (response and acceptance times) • If the patient was booked with a post-acute care provider
by Referral Date	This option displays the above patient information by their referral date.

All Cases By Discharged Date

1. Select the **All Cases** option within the expanded **Hospital Operations** section and then select the **by Discharged Date** option.



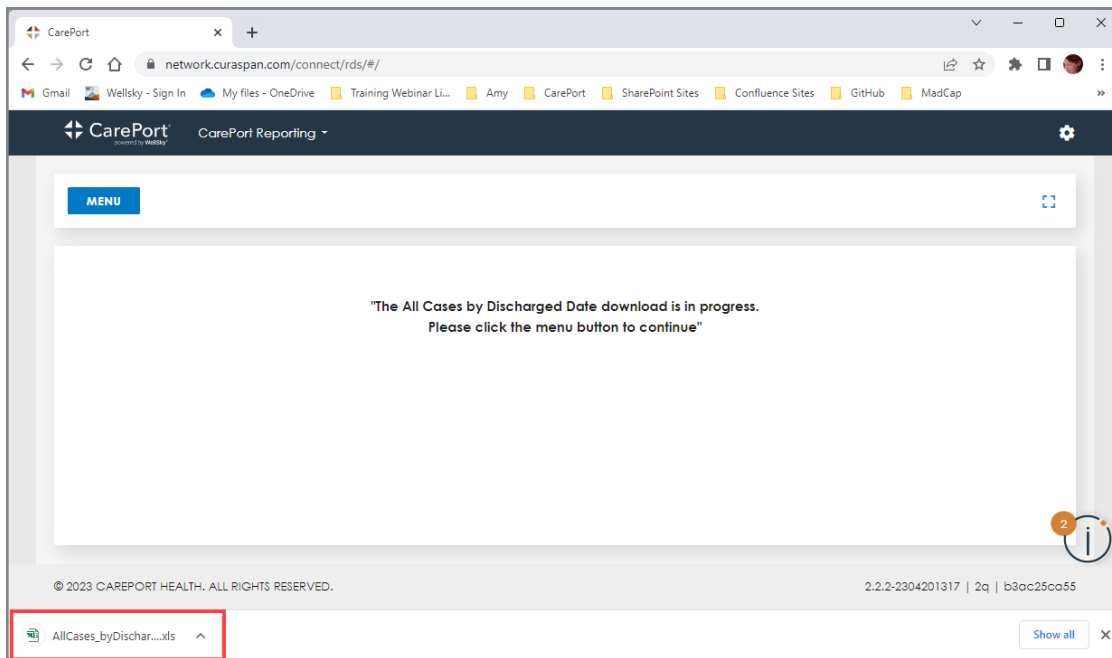
The **Parameters** window displays.



2. Enter or select search criteria for the required fields and when finished, click the **EXPORT** button, and select either **CSV** or **Excel**.

 **NOTE** – Users can also click the **RUN REPORT** button.

The following screen displays as the report is generating. The report populates and a downloaded version displays within the bottom left of the browser window.



NOTE – The report also saves to the Downloads folder on your computer.

3. Click the downloaded report to open. The **Cases Discharged Between [start date and end date]** report opens in Excel and has three (3) tabs:

- All Cases by Discharge Date
- Parameters
- Glossary

No	Facility Group	Facility	Primary Contact	Patient MRN	Patient Account Number	Patient Last Name	Patient First Name	Patient Class	Patient Date of Birth	Patient Zip Code	Covid19 Tag	Primary Payer	Secondary Payer	Primary Diagnosis (Admitting)	Secondary Diagnosis (Admitting)	Attending Physician	Admit Type	Acute Transfer From?	Acute Transfer To?	Discharge Disposition	Placement	Level of Care
1	ALL FACILITIES	Auburn Lake Demo Hospital	DUNAWAY,CHRIS	2638765746357	6546516874654	LOBLAW	BOB	Inpatient	5/22/1939		Yes	Medicare	Royd's Bail Shop and Discount Medical Insurance	COPD			1			D/C to SNF	FACILITY	DME Supplier
2	ALL FACILITIES	Auburn Lake Demo Hospital	DUNAWAY,CHRIS	2638765746357	6546516874654	LOBLAW	BOB	Inpatient	5/22/1939		Yes	Medicare	Royd's Bail Shop and Discount Medical Insurance	COPD			1			D/C to SNF	FACILITY	DME Supplier
3	ALL FACILITIES	Auburn Lake Demo Hospital	DUNAWAY,CHRIS	2638765746357	6546516874654	LOBLAW	BOB	Inpatient	5/22/1939		Yes	Medicare	Royd's Bail Shop and Discount Medical Insurance	COPD			1			D/C to SNF	FACILITY	DME Supplier
4	ALL FACILITIES	Auburn Lake Demo Hospital	DUNAWAY,CHRIS	2638765746357	6546516874654	LOBLAW	BOB	Inpatient	5/22/1939		Yes	Medicare	Royd's Bail Shop and Discount Medical Insurance	COPD			1			D/C to SNF	FACILITY	DME Supplier
5	ALL FACILITIES	Auburn Lake Demo Hospital	DUNAWAY,CHRIS	2638765746357	6546516874654	LOBLAW	BOB	Inpatient	5/22/1939		Yes	Medicare	Royd's Bail Shop and Discount Medical Insurance	COPD			1			D/C to SNF	FACILITY	DME Supplier
6	ALL FACILITIES	Auburn Lake Demo Hospital	DUNAWAY,CHRIS	2638765746357	6546516874654	LOBLAW	BOB	Inpatient	5/22/1939		Yes	Medicare	Royd's Bail Shop and Discount Medical Insurance	COPD			1			D/C to SNF	FACILITY	DME Supplier
7	ALL FACILITIES	Auburn Lake Demo Hospital	DUNAWAY,CHRIS	2638765746357	6546516874654	LOBLAW	BOB	Inpatient	5/22/1939		Yes	Medicare	Royd's Bail Shop and Discount Medical Insurance	COPD			1			D/C to SNF	FACILITY	DME Supplier

If the **RUN REPORT** button was selected, then the following displays.

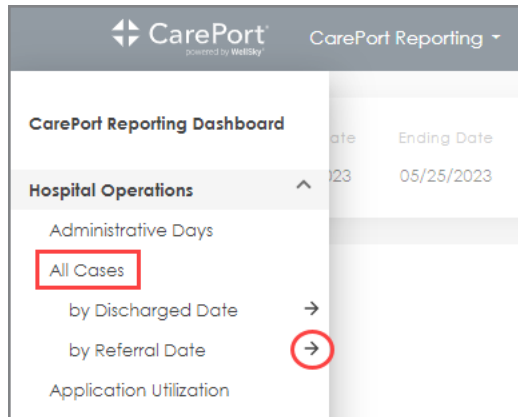
The screenshot shows the CarePort Reporting interface for 'Hospital Operations: All Cases by Discharged Date'. The top navigation bar includes the CarePort logo and a settings icon. Below the navigation bar is a filter section with a 'MENU' button and various filters: Starting Date (05/01/2023), Ending Date (05/25/2023), Facility Groups (ALL FACILITIES), Facility (Auburn Lake Demo Hospital), Time Zone (EST), Placement Types (6 selected), Patient Class (3 selected), and Levels Of Care (45 selected). Below the filters is a pagination control showing 'Page 1 of 2' with a red circle around the next page icon and a 'Go to page' input field. The main content is a table with the following columns: No, Facility Group, Facility, Primary Contact, Patient MRN, Patient Account Number, Patient Last Name, Patient First Name, Patient Class, Patient Date of Birth, and Patient Code. The table contains four rows of data, all from Auburn Lake Demo Hospital. A red circle with the number '2' is placed over the next page navigation icon on the right side of the table.

No	Facility Group	Facility	Primary Contact	Patient MRN	Patient Account Number	Patient Last Name	Patient First Name	Patient Class	Patient Date of Birth	Patient Code
1	ALL FACILITIES	Auburn Lake Demo Hospital	■■■■■■■■■■,CHRIS	2638765746357	6546516874654	LOBLAW	BOB	Inpatient	5/22/1939	
2	ALL FACILITIES	Auburn Lake Demo Hospital	■■■■■■■■■■,CHRIS	2638765746357	6546516874654	LOBLAW	BOB	Inpatient	5/22/1939	
3	ALL FACILITIES	Auburn Lake Demo Hospital	■■■■■■■■■■,CHRIS	2638765746357	6546516874654	LOBLAW	BOB	Inpatient	5/22/1939	
4	ALL FACILITIES	Auburn Lake Demo Hospital	■■■■■■■■■■,CHRIS	2638765746357	6546516874654	LOBLAW	BOB	Inpatient	5/22/1939	

4. Click the **next page >** icon to display additional report information.

All Cases by Referral Date

1. Select the **All Cases** option within the expanded **Hospital Operations** section and then select the **by Referral Date** option.



The **Parameters** window displays.

The Parameters window displays the following information:

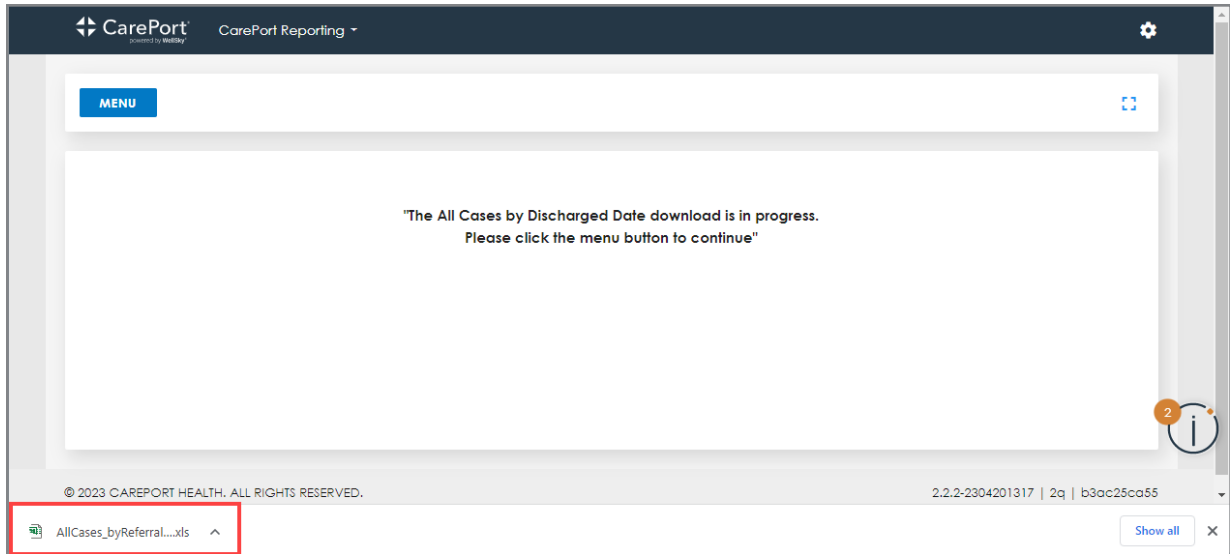
- Starting Date:** 05/01/2023
- Ending Date:** 05/25/2023
- Facility:** Auburn Lake Demo Hospital
- Time Zone:** EST
- Placement Types:** 6 selected
- Patient Class:** All Selected
- Levels Of Care:** All Selected

At the bottom of the window, there are three buttons: **CANCEL**, **RUN REPORT**, and **EXPORT**.

2. Enter or select search criteria for the required fields and when finished, click the **EXPORT** button, and select either CSV or Excel from the drop-down menu that displays.

 **NOTE** – You can also click the **RUN REPORT** button.

The report generates and a downloaded version displays within the bottom left of the browser window.



 **NOTE** – The report also saves to the **Downloads** folder on your computer.

3. Click the downloaded report to open.

The **Cases Referred Between [start date and end date]** report displays and has three (3) tabs:

- All Cases by Referral Date
- Parameters
- Glossary

No.	Facility Group	Facility	Primary Contact	Patient MRN	Patient Account Number	Patient Last Name	Patient First Name	Patient Class	Patient Date of Birth	Primary Payer	Secondary Payer	Primary Diagnosis (Admitting)	Secondary Diagnosis (Admitting)	Attending Physician	Admit Type	Acute Transfer From?	Discharge Disposition	Placement Type	Level of Care	Home Health Agency	Admission Date	Discharge Date
1	ALL FACILITIES	Auburn Lake Demo Hospital	[REDACTED], KAT	543216789	888555444	HAGRID	RUBBUS	Inpatient	12/06/1928	Hogwarts Healthcare		BURNS			4			UNKNOWN	Home Health Agency		3/2/2023	
2	ALL FACILITIES	Auburn Lake Demo Hospital	[REDACTED], MEAGAN	16886351351	999874261	FLAG	FANNIE	Inpatient	05/31/1956	Aetna		FRACTURE, LOWER EXTREMITY			4			UNKNOWN	DME Supplier		5/22/2023	
3	ALL FACILITIES	Auburn Lake Demo Hospital	[REDACTED], MEAGAN	16886351351	999874261	FLAG	FANNIE	Inpatient	05/31/1956	Aetna		FRACTURE, LOWER EXTREMITY			4			UNKNOWN	Skilled Nursing Facility (SNF)		5/22/2023	
4	ALL FACILITIES	Auburn Lake Demo Hospital	[REDACTED], MEAGAN	16886351351	999874261	FLAG	FANNIE	Inpatient	05/31/1956	Aetna		FRACTURE, LOWER EXTREMITY			4			UNKNOWN	Skilled Nursing Facility (SNF)		5/22/2023	
5	ALL FACILITIES	Auburn Lake Demo Hospital	[REDACTED], CHRIS	2638765746357	6546516874654	LOBLAW	BOB	Inpatient	05/22/1939	Medicare	Floyd's Bail Shop and Discount Medical Insurance	COPD			1		D/C to SNF	FACILITY	Skilled Nursing Facility (SNF)		5/21/2023	
6	ALL FACILITIES	Auburn Lake Demo Hospital	[REDACTED], CHRIS	2638765746357	6546516874654	LOBLAW	BOB	Inpatient	05/22/1939	Medicare	Floyd's Bail Shop and Discount Medical Insurance	COPD			1		D/C to SNF	FACILITY	DME Supplier		5/21/2023	
7	ALL FACILITIES	Auburn Lake Demo Hospital	[REDACTED], CHRIS	2638765746357	6546516874654	LOBLAW	BOB	Inpatient	05/22/1939	Medicare	Floyd's Bail Shop and Discount Medical Insurance	COPD			1		D/C to SNF	FACILITY	DME Supplier		5/21/2023	
8	ALL FACILITIES	Auburn Lake Demo Hospital	[REDACTED], CHRIS	2638765746357	6546516874654	LOBLAW	BOB	Inpatient	05/22/1939	Medicare	Floyd's Bail Shop and Discount Medical Insurance	COPD			1		D/C to SNF	FACILITY	DME Supplier		5/21/2023	

If the **RUN REPORT** button was selected, then the following displays.

No.	Facility Group	Facility	Primary Contact	Patient MRN	Patient Account Number	Patient Last Name	Patient First Name	Patient Class	Patient Date of Birth	Primary Payer
1	ALL FACILITIES	Auburn Lake Demo Hospital	[REDACTED], KAT	543216789	888555444	HAGRID	RUBBUS	Inpatient	12/06/1928	Hogwarts Healthcare
2	ALL FACILITIES	Auburn Lake Demo Hospital	[REDACTED], MEAGAN	16886351351	999874261	FLAG	FANNIE	Inpatient	05/31/1956	Aetna
3	ALL FACILITIES	Auburn Lake Demo Hospital	[REDACTED], MEAGAN	16886351351	999874261	FLAG	FANNIE	Inpatient	05/31/1956	Aetna
4	ALL FACILITIES	Auburn Lake Demo Hospital	[REDACTED], MEAGAN	16886351351	999874261	FLAG	FANNIE	Inpatient	05/31/1956	Aetna
5	ALL FACILITIES	Auburn Lake Demo Hospital	[REDACTED], CHRIS	2638765746357	6546516874654	LOBLAW	BOB	Inpatient	05/22/1939	Medicare
6	ALL FACILITIES	Auburn Lake Demo Hospital	[REDACTED], CHRIS	2638765746357	6546516874654	LOBLAW	BOB	Inpatient	05/22/1939	Medicare

4. Click the **next page** > icon to display additional report information.

All Cases Report Glossary

Field	Description
Start and End Date	The start and end date is based on discharge date.
Accept Date	The date on which the patient was accepted by the post-acute provider.
Accept Time (Time Zone)	The time at which the patient was accepted by the post-acute provider (in the time zone you specify as a report parameter).
Admission Date	The patient's actual admit date received via the ADT interface from the hospital information system (HIS).
Admit Type	<ul style="list-style-type: none"> The type of patient admission. Possible values include, but are not limited to the following: <ul style="list-style-type: none"> Routine Emergency Scheduled Urgent Newborn
Attending Physician	The physician responsible for the care and diagnosis of a patient during an episode of care.
Booked Date	The date on which the patient was booked with the post-acute provider.
Booked Time (Time Zone)	The time at which the patient was booked with the post-acute provider (in the time zone you specify as a report parameter).
Booking Made Flag?	<ul style="list-style-type: none"> Indicates whether a referral made to a specific post-acute provider was booked. Possible values are Yes and No. Yes displays when the case was booked with the post-acute provider.
Connected Flag?	<ul style="list-style-type: none"> Indicates whether the post-acute provider receives referrals electronically through an application such as CarePort Intake. Possible values are Yes and No.
Covid19 Tag	If patient has COVID19 then it will display accordingly
CMS Number	The Center for Medicare and Medicaid Services number assigned to the facility for which the report was run.

Field	Description
CST (Central Standard Time)	<ul style="list-style-type: none"> A time zone which is six (6) hours behind GMT. Prior to running an All Cases by Discharge Date Report, users may specify the time zone in which the data is represented.
Delay Days	The number of days a patient remains in the hospital past the estimated discharged date.
Delay Reason	For the cases that were pulled into the Workbook where the discharge date is later than the estimated discharge date, this is the delay reason selected by the case manager in the CarePort Discharge application.
Discharge Date	The patient's actual discharge date received via the ADT interface from the hospital information system (HIS).
Discharge Disposition	The discharge disposition description received via the ADT interface from the hospital information system (HIS).
EST (Eastern Standard Time)	<ul style="list-style-type: none"> A time zone which is five (5) hours behind GMT. Prior to running an All Cases by Discharge Date Report, users may specify the time zone in which the data is represented.
Estimated Discharge Date	Estimated discharge date captured by the case manager through CarePort Discharge .
Facility	Indicates the name of the hospital that sent/booked referrals and performed discharges for its patients.
Facility Group	The corporate division or grouping to which a hospital is assigned.
Final Hospital Status	<ul style="list-style-type: none"> The final response to a referral sent by the hospital. Possible responses are: <ul style="list-style-type: none"> Booked Canceled Notified
Final Provider Status	<ul style="list-style-type: none"> The final response of a post-acute provider to a referral sent by the hospital. Possible responses are: <ul style="list-style-type: none"> Accept Decline Pending Review No Response

Field	Description
GMT (Greenwich Mean Time)	<ul style="list-style-type: none"> Our data warehouse stores data in Eastern Standard Time (EST), irrespective of Eastern Daylight Time (EDT) or Daylight-Saving Time (DST). The CarePort Discharge Reporting Hub expresses its data in Greenwich Mean Time (GMT), the mean solar time (measured from midnight) on the 0° meridian that passes through Greenwich, England, which is used as a basis of standard time throughout the world. It can easily be converted to any time zone you may need.
HST (Hawaii–Aleutian Time Zone)	<ul style="list-style-type: none"> A time zone which is ten (10) hours behind GMT. Prior to running an All Cases by Discharge Date Report, users may specify the time zone in which the data is represented.
In-Network Flag?	<ul style="list-style-type: none"> Indicates whether the post-acute provider is in the hospital's network. Possible values are Yes and No.
Length of Stay	The total number of days between a patient's date of admission and date of discharge.
Level of Care	<ul style="list-style-type: none"> The level of care (LOC) corresponds to the LOCs selected for the encounter during the REFER stage for sending out referrals to post-acute providers within CarePort Discharge. A patient encounter could have one (1) or more levels of care. Typically, the LOCs correspond to all types of post-acute care that the patient required after leaving the hospital. Please note that if LOC shows “no referral” this means there was no referral.
Medically Ready Date	The GMT date when the Medically Ready tag was applied to the patient.
Medically Ready Days	The number of days between when the Medically Ready tag was applied to the patient and the actual discharge date (calculated based on GMT dates)
MST (Mountain Standard Time)	<ul style="list-style-type: none"> A time zone in North America which is seven (7) hours behind GMT. Prior to running an All Cases by Discharge Date Report, users may specify the time zone in which the data is represented.
Patient Account Number	The patient's episode identifier received via the ADT interface from the hospital information system (HIS).
Patient Class	Indicates the type of patient that received discharge services: <ul style="list-style-type: none"> (I) for inpatient discharges (O) for outpatient discharges or (E) for emergency room discharges.

Field	Description
Patient Date of Birth	The patient's date of birth (DOB) as indicated by the hospital information system (HIS).
Patient First Name	The patient's first name received via the ADT interface from the hospital information system (HIS).
Patient Last Name	The patient's last name received via the ADT interface from the hospital information system (HIS).
Patient MRN	The Medical Record Number (MRN) received via the ADT interface from the hospital information system (HIS).
Patient Zip Code	The Patient's ZIP Code received via the ADT interface from the hospital information system (HIS).
Placement Type	<ul style="list-style-type: none"> The application's internal code which indicates the type of patient placement: <ul style="list-style-type: none"> Facility, Transfer, Home Care, Home (Routine), Other or Unmapped. These codes are mapped to the discharge disposition codes that are received from the ADT feed. The placement type codes are used for identifying patient encounters that required discharge services. It's important that disposition code mappings are accurate and kept up to date.
PML Received Type	The type (digital and/or printed) of any provider-matching list shared during the patient encounter.
Primary Contact	The last person who was assigned as the primary contact for the patient encounter.
Primary Diagnosis (Admitting)	The condition or ailment for which a patient is initially admitted to the hospital for care.
Primary Payer	The principal insurance company responsible for compensating a healthcare provider for a patient's services.

Field	Description
Provider Address 1	The street address for the post-acute provider as listed in our Provider Data Bank.
Provider Address 2	A secondary street address for the post-acute provider as listed in our Provider Data Bank.
Provider City	The city for the post-acute provider as listed in our Provider Data Bank.
Provider Name	The post-acute provider's name as listed in our Provider Data Bank.
Provider Network	<ul style="list-style-type: none"> Indicates the pre-defined network to which a healthcare provider belongs. Each facility can create its own unique provider networks.
Provider State	The state for the post-acute provider as listed in our Provider Data Bank.
Provider ZIP Code	The ZIP code for the post-acute provider as listed in our Provider Data Bank.
PST (Pacific Standard Time)	<ul style="list-style-type: none"> A time zone which is eight (8) hours behind GMT, determined by the mean solar time of the 120th meridian west of Greenwich, England. Prior to running an All Cases by Referred Date Report, users may specify the time zone in which the data is represented.
Referral Date	Indicates when the referral was sent to the post-acute provider.
Referral Made Flag?	<ul style="list-style-type: none"> Indicates whether a case was referred to a post-acute provider. Possible values are Yes and No. Yes displays if a referral was made.
Referral Time (Time Zone)	The time at which a referral is sent by the hospital (in the time zone you specify as a report parameter).
Response Date	The date on which the post-acute provider first opens a referral .
Response Time (Time Zone)	The time at which the post-acute provider first opens a referral (in the time zone you specify as a report parameter).
Secondary Diagnosis (Admitting)	A condition or ailment which must be treated but is superseded by the primary diagnosis at the time of admittance.
Secondary Payer	If applicable, an insurance company which acts as an alternative to the primary payer.
Standard Decline Reason	The reason selected by the post-acute provider for declining a referred case.

Field	Description
Star Rating	<ul style="list-style-type: none">• A standard for the measurement of quality across healthcare providers.• Created by the Centers for Medicare and Medicaid, these five-star ratings are available for Skilled Nursing Facilities (SNFs), Home Health Agencies (HHAs) and dialysis facilities.
Unit	Indicates the current or last hospital unit to which the patient was assigned. This information is received via the ADT interface from the hospital information system (HIS).



Cases in Progress Report

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Introduction

There are two (2) options for this report:

Option	Description
by Case Status	<ul style="list-style-type: none">• This report displays the total amount of patient cases for the timeframe selected from the Parameters window.• Additionally, it displays how many of those patient cases were:<ul style="list-style-type: none">• referred• not referred• booked• not booked
by Summary	This report presents as a table view and provides a summary view .

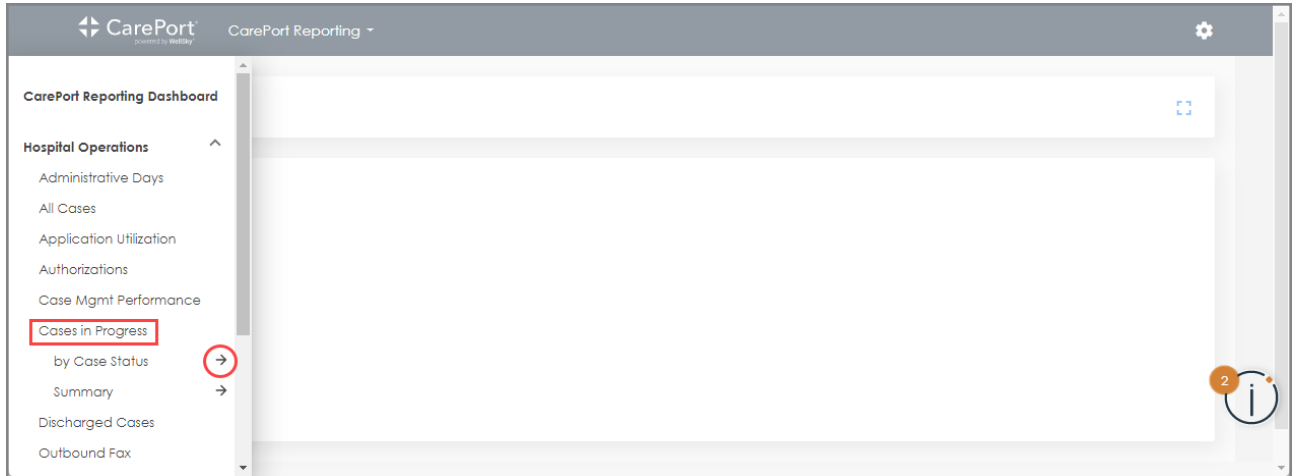
Cases in Progress by Case Status

This report has two (2) display modes:

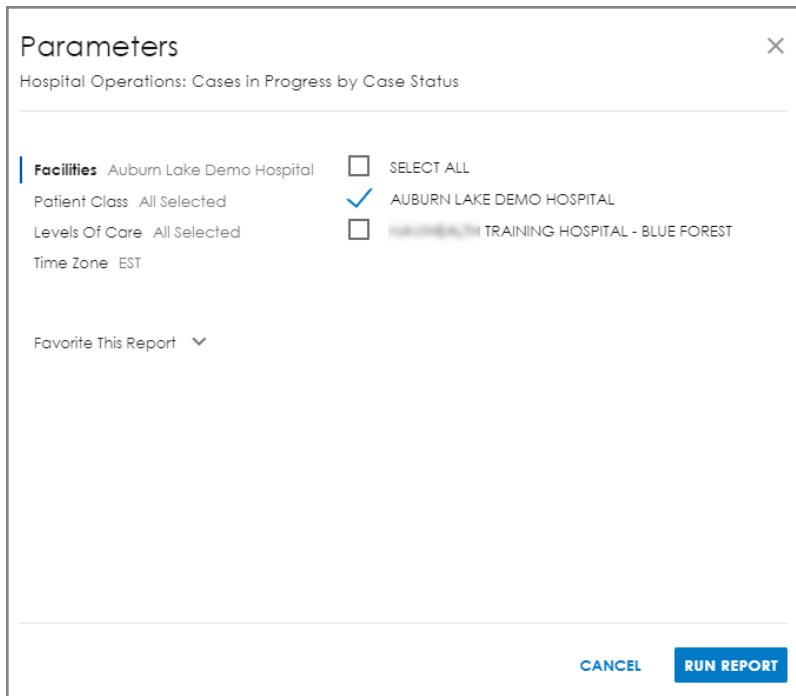
Mode	Description
Display Graph	<ul style="list-style-type: none"> • This mode displays a total case count in progress by Case Status: <ul style="list-style-type: none"> • Not Referred • Referred Not Accepted • Declined • Accepted Not Booked • Booked • Total Recently Discharged • The number of cases recently discharged with incomplete closing statuses: <ul style="list-style-type: none"> • Closing in 2+ Days • Closing in 2 Days • Closing Tomorrow • Closing Today
Display Data	<p>This mode presents as a table view and provides a summary view of:</p> <ul style="list-style-type: none"> • Not Referred • Referred Not Accepted • Declined • Accepted Not Booked • Booked • Total Recently Discharged

Display Graph

1. Select the **Cases in Progress** option within the expanded **Hospital Operations** section and then select the by **Case Status** option.

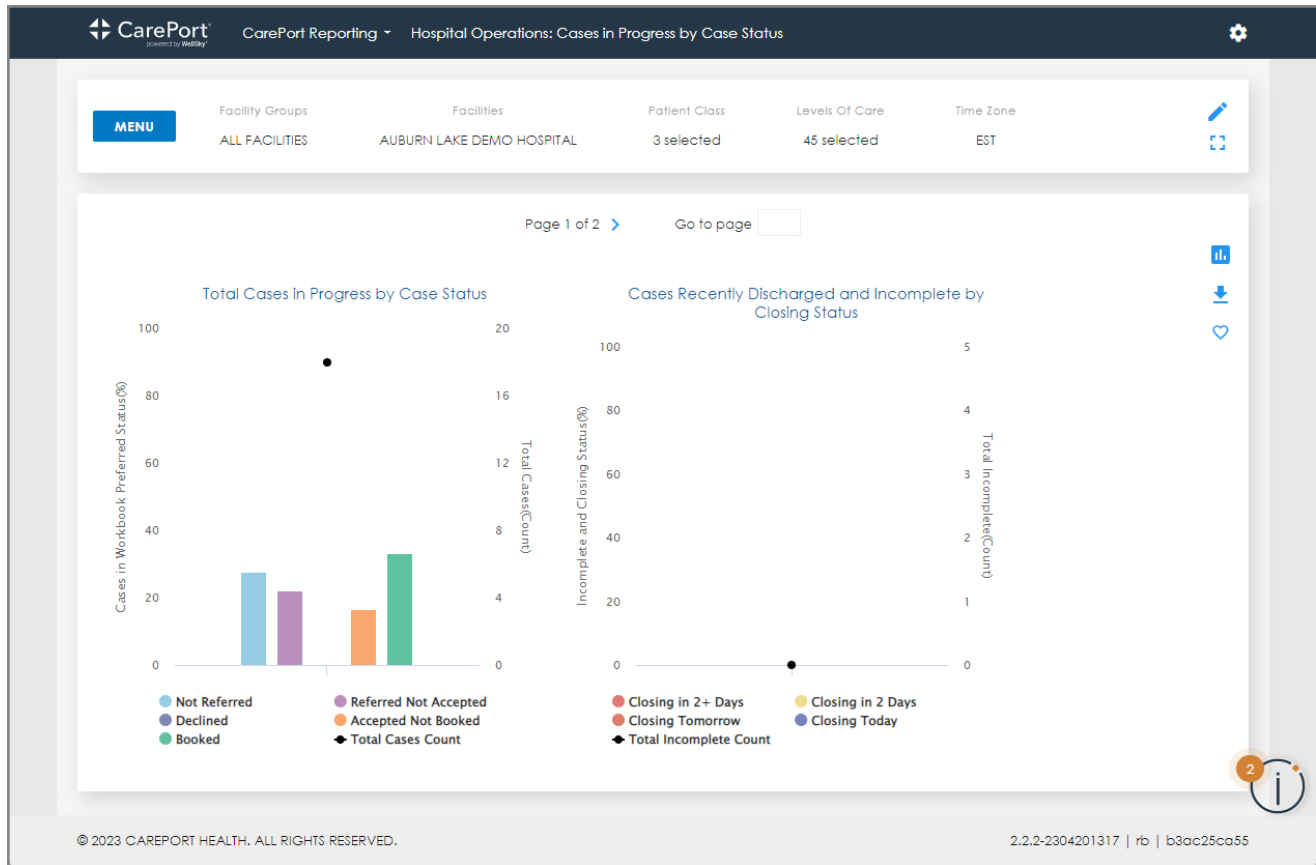


The **Parameters** window displays.

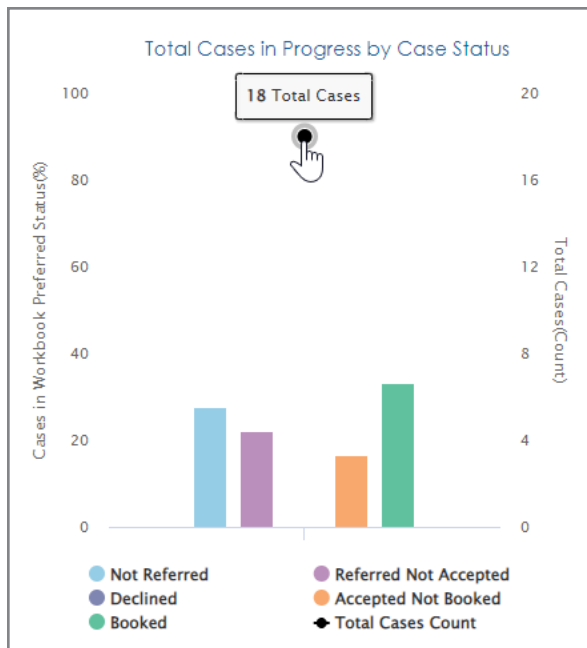


2. Enter or select search criteria for the required fields and when finished, click the **RUN REPORT** button.

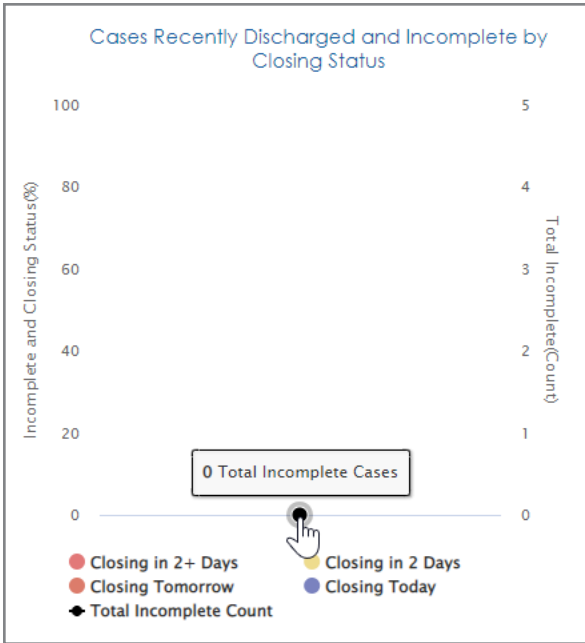
The Cases in Progress by Case Status report displays with the default setting of Display Graph.



In the above example, there are 18 Total Cases in Progress by Case Status (hover over the black dot).

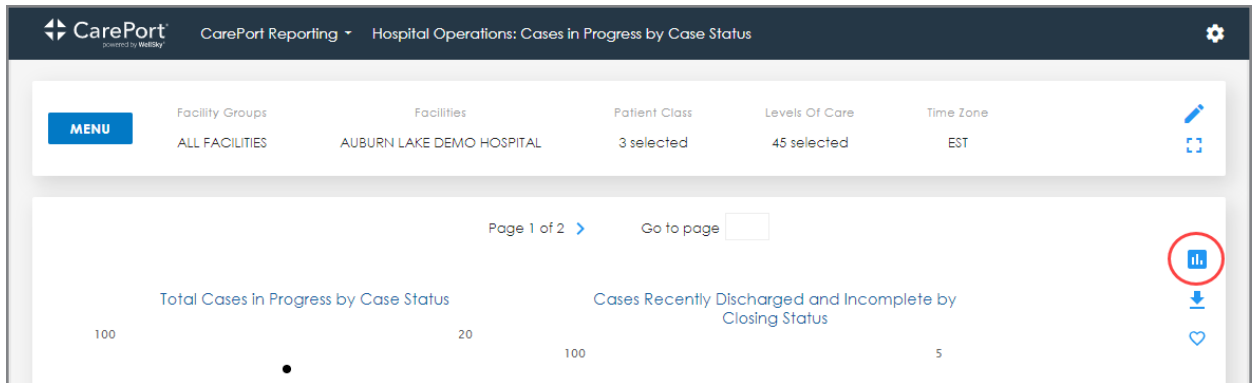


Each column displays the number and percentage of those 18 cases for each status. Hovering over the black dot within the **Cases Recently Discharged and Incomplete by Closing Status** indicates there are zero (0) Incomplete Cases.




Display Data

1. Click the **Display**  icon, located in the upper right-hand corner to display data.



This report displays the total number of cases currently in progress and of that number, how many have been:

- Not Referred
- Referred not Accepted
- Declined
- Accepted but not Booked
- Booked
- Recently Discharged

Page 1 of 2  Go to page

Cases Currently In Progress
As of 05/25/2023

	Total Cases	Cases in the Workbook					Total Recently Discharged	Total	
		Not Referred	Referred not Accepted	Declined	Accepted Referrals but not Booked	Booked		Incomplete & Closing in 2+ days	Incomplete & Closing in 2 or less days
Total	18	5	4	0	3	6	0	0	
Auburn Lake Demo Hospital	18	5	4	0	3	6	0	0	

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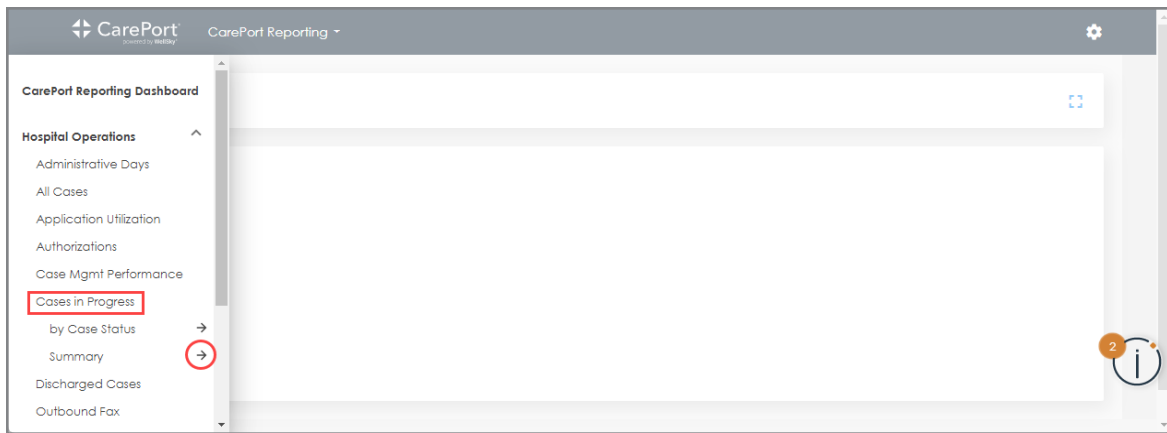
2. Click the **next page**  icon to display additional report information.

Cases in Progress Summary

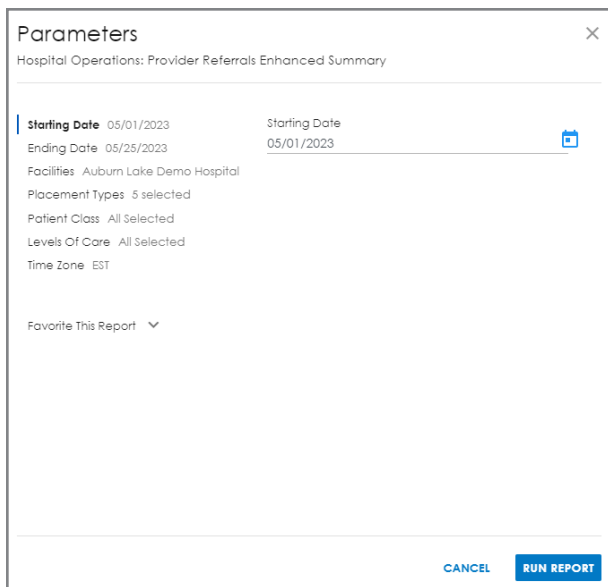
This report provides a summarization of the **total number of patient cases** within the Workbook by:

- Not Referred
- Referred not Accepted
- Declined
- Accepted Referrals but not Booked
- Booked


1. Select the **Cases in Progress** option within the expanded **Hospital Operations** section and then select the **Summary** option.



The **Parameters** window displays.



2. Enter or select search criteria for the required fields and when finished, click the **RUN REPORT** button. The **Cases in Progress Summary** report displays.

Page 1 of 2  Go to page

Provider Referrals Enhanced Summary Report
Cases Referred Between May 1, 2023 - May 25, 2023

	Connected / Unconnected	Total Referrals	Final Hospital Status		Final Provider Status							Total Opened (No Action Taken)
			Total Booked	Total Cancelled	Total Responded	Total Accepted	Total Pending	Total Declined	Total Forwarded	Total Other Responses		
Total		25	5	20	10	5	2	5	0	0	15	
All Saints Nursing Center	Connected	2	0	2	0	0	0	0	0	0	2	
Apple Grove Care Center	Unconnected	2	2	0	1	1	1	0	0	0	1	
HomeCare Test 13 DME	Connected	2	0	2	0	0	0	0	0	0	2	
HomeCare Test 4	Connected	2	0	2	0	0	0	0	0	0	2	
Concord Shares	Connected	2	0	2	2	2	0	0	0	0	0	
Curaspan TEST DME	Connected	2	0	2	0	0	0	0	0	0	2	
Health Training DME	Connected	2	0	2	0	0	0	0	0	0	2	

3. Click the **next page**  icon to display additional report information.

Cases in Progress Report Glossary

Field	Description
Accepted Date*	The date on which the patient was accepted by the post-acute provider.
Accepted Time*	The time at which the patient was accepted by the post-acute provider.
Admit Date*	The patient's actual admit date received via the ADT interface from the hospital information system (HIS).
Booked Date*	The date on which the patient was booked with the post-acute provider.
Booked Time*	The time at which the patient was booked with the post-acute provider.
Booking Made Flag*	<ul style="list-style-type: none"> Indicates whether a referral made to a specific post-acute provider was booked. Possible values are Yes and No. Yes displays when the case was booked with the post-acute provider.
Cases in the Workbook-Accepted but Not Booked	Active cases in the Workbook that have been accepted by the post-acute provider, but not booked by the hospital.
Cases in Workbook-Booked	Active cases in the Workbook that have been booked by the hospital.
Cases in Workbook-Declined	Active cases in the Workbook that have been declined by the post-acute provider.
Cases in the Workbook - Not Referred	Active cases in the Workbook that have not been referred to any post-acute providers by the hospital.
Cases in the Workbook - Referred Not Accepted	Active cases in the Workbook that have been referred by the hospital but have not been accepted by the post-acute provider.
Declined Flag*	<ul style="list-style-type: none"> Indicates whether the post-acute provider declined a referral. Possible values are Yes and No. Yes displays when the post-acute provider declined the case.
Declined Reason*	The reason selected by the post-acute provider for declining a referred case.
Discharge Date*	The patient's actual discharge date received via the ADT interface from the hospital information system (HIS).

Field	Description
Discharge Disposition Code*	The discharge disposition code received via the ADT interface from the hospital information system (HIS).
Discharge Disposition Description*	The discharge disposition description received via the ADT interface from the hospital information system (HIS).
Estimated Discharge Date*	Estimated discharge date captured by the case manager through CarePort Discharge .
Facility Group*	The corporate division or grouping to which a hospital is assigned.
GMT (Greenwich Mean Time)	<ul style="list-style-type: none"> • Our data warehouse stores data in the following: <ul style="list-style-type: none"> • Eastern Standard Time (EST), • irrespective of Eastern Daylight Time (EDT) or • Daylight-Saving Time (DST). • The CarePort Discharge Reporting Hub expresses its data in Greenwich Mean Time (GMT), the mean solar time (measured from midnight) on the 0° meridian that passes through Greenwich, England, which is used as a basis of standard time throughout the world. • It can easily be converted to any time zone you may need.
Hospital Name*	Indicates the name of the hospital that sent and booked referrals and performed discharges for its patients.
Incomplete and Closing Tomorrow	<ul style="list-style-type: none"> • Cases that were moved to the Missing Info tab in CarePort Discharge but are considered incomplete because they are missing information for a booked post-acute provider. • This record will automatically close in one (1) day.
Incomplete and Closing in 2 Days	<ul style="list-style-type: none"> • Cases that were moved to the Missing Info tab in CarePort Discharge but are considered incomplete because they are missing information for a booked post-acute provider. • This record will automatically close in two (2) days.
Incomplete and Closing in 2+ Days	<ul style="list-style-type: none"> • Cases that were moved to the Missing Info tab in CarePort Discharge but are considered incomplete because they are missing information for a booked post-acute provider. • This record will automatically close in more than two (2) days.
Incomplete and Closing Today	<ul style="list-style-type: none"> • Cases that were moved to the Missing Info tab in CarePort Discharge but are considered incomplete because they are missing information for a booked post-acute provider. • This record will automatically close today.

Field	Description
In Network Flag	Indicates whether the provider is in the acute care facility's provider network.
Level of Care*	<ul style="list-style-type: none"> The level of care (LOC) corresponds to the LOCs selected for the encounter during the REFER stage for sending out referrals to post-acute providers within CarePort Discharge. A patient encounter could have one (1) or more levels of care. Typically, the LOCs correspond to all types of post-acute care that the patient required after leaving the hospital.
Moved to Missing Info*	The date on which a patient record was moved to the Missing Info tab in CarePort Discharge .
Patient Account Number*	The patient's episode identifier received via the ADT interface from the hospital information system (HIS).
Patient Class*	Indicates the type of patient that received discharge services: <ul style="list-style-type: none"> (I) for inpatient discharges, (O) for outpatient discharges or (E) for emergency room discharges.
Patient Date of Birth*	The patient's date of birth (DOB) as indicated by the hospital information system (HIS).
Patient First Name*	The patient's first name received via the ADT interface from the hospital information system (HIS).
Patient Last Name*	The patient's last name received via the ADT interface from the hospital information system (HIS).
Patient MRN*	The Medical Record Number (MRN) received via the ADT interface from the hospital information system (HIS).

Field	Description
Placement type*	<ul style="list-style-type: none"> The application's internal code which indicates the type of patient placement: <ul style="list-style-type: none"> Facility, Transfer, Home Care, Home (Routine) or Other. These codes are mapped to the discharge disposition codes that are received from the ADT feed. The placement type codes are used for identifying patient encounters that required discharge services. It's important that disposition code mappings are accurate and kept up to date.
Primary Contact*	The last person who was assigned as the primary contact for the patient encounter.
Provider Name*	This is the post-acute provider's name as listed in the Provider Data Bank.
Recently Discharged - Incomplete?*	<ul style="list-style-type: none"> Indicates whether a referral was incomplete when it was moved from the Workbook to the Missing Info tab. Possible values are Yes and No. Yes displays if the record was incomplete.
Referral Made Flag*	<ul style="list-style-type: none"> Indicates whether a referral was made for the patient to a post-acute provider. Possible values are Yes and No. Yes displays if a referral was made.
Referred Date*	The date on which a referral to a post-acute provider was made for a patient.
Referred Time*	The time at which a referral to a post-acute provider was made.
Response Date*	The date on which the post-acute provider first opens a referral.
Response Time*	The time at which the post-acute provider first opens a referral.
Services Required?*	<ul style="list-style-type: none"> Indicates whether the patient did or did not require services at the next level of care in the Missing Info tab, as determined by the case manager. This is derived from the No Services check box while updating a patient record in the Missing Info tab in CarePort Discharge. If No Services is selected, the patient did not require services and the Services Required? field displays No.

Field	Description
<p>Total Cases</p>	<p>The total number of active cases worked on by the case manager, for example:</p> <ul style="list-style-type: none"> • assigned cases to workbook, • become a primary, • become a subscriber, • sent a referral, • sent a message, etc.
<p>Total Recently Discharged</p>	<p>The total number of cases currently in the Missing Info tab, calculated as the sum of the following:</p> <ul style="list-style-type: none"> • Incomplete and Closing in 2+ Days, • Incomplete and Closing in 2 Days, • Incomplete and Closing Tomorrow and • Incomplete and Closing Today.
<p>Unit*</p>	<p>Indicates the current or last hospital unit to which the patient was assigned.</p> <p>This information is received via the ADT interface from the hospital information system (HIS).</p>



Provider Referrals Enhanced Report

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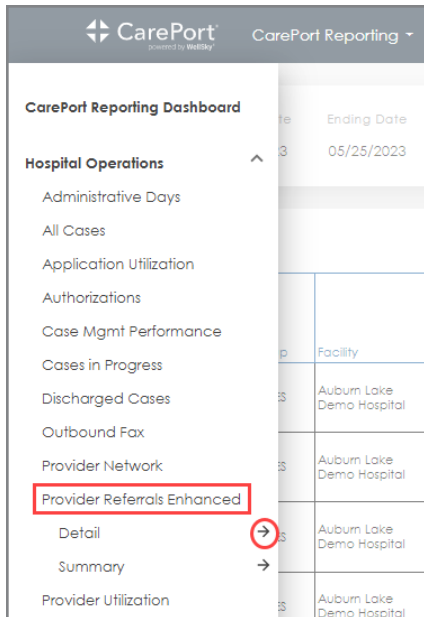
Introduction

There are two (2) options for this report:

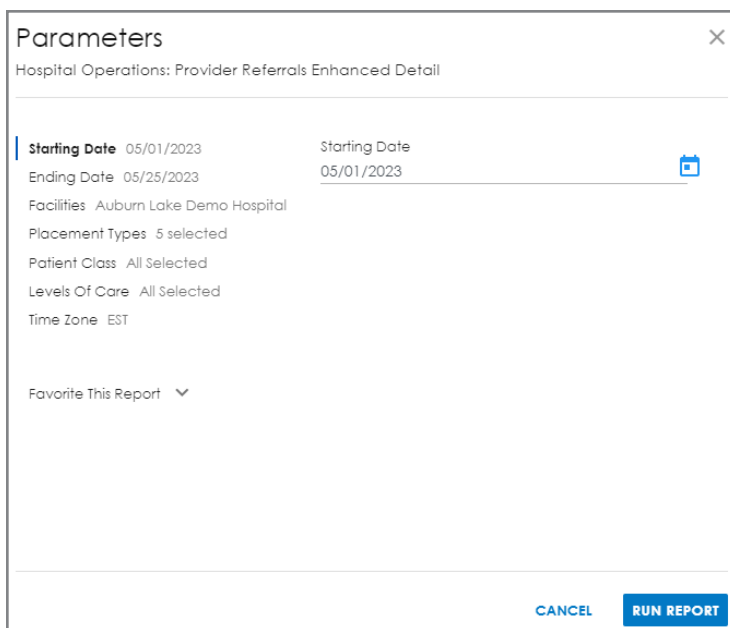
Option	Description
Detailed	This report displays details of the providers who were sent referrals.
Summary	This report presents a table view of the providers who were sent referrals and summarizes the numbers for hospital statuses and provider statuses.

Provider Referrals Enhanced Detail

1. Select the **Provider Referrals Enhanced** option within the expanded **Hospital Operations** section and then select the **Detail** option.



The **Parameters** window displays.



2. Enter or select search criteria for the required fields and when finished, click the **RUN REPORT** button.

The Provider Referrals Enhanced Detail Report displays.

The screenshot shows the CarePort Reporting interface for 'Hospital Operations: Provider Referrals Enhanced Detail'. The top navigation bar includes the CarePort logo and a settings icon. Below the navigation bar, there are filter options for Starting Date (05/01/2023), Ending Date (05/25/2023), Facility Groups (ALL FACILITIES), Facilities (AUBURN LAKE DEMO HOSPITAL), Placement Types (5 selected), Patient Class (3 selected), Levels Of Care (45 selected), and Time Zone (EST). A 'MENU' button is also present.

Below the filters, the pagination controls show 'Page 1 of 3' with a red circle around the right arrow icon, and a 'Go to page' input field. The report title is 'Provider Referrals Enhanced Detail Report' with a subtitle 'Cases Referred Between May 1, 2023 - May 25, 2023'. There are download and favorite icons on the right side of the report area.

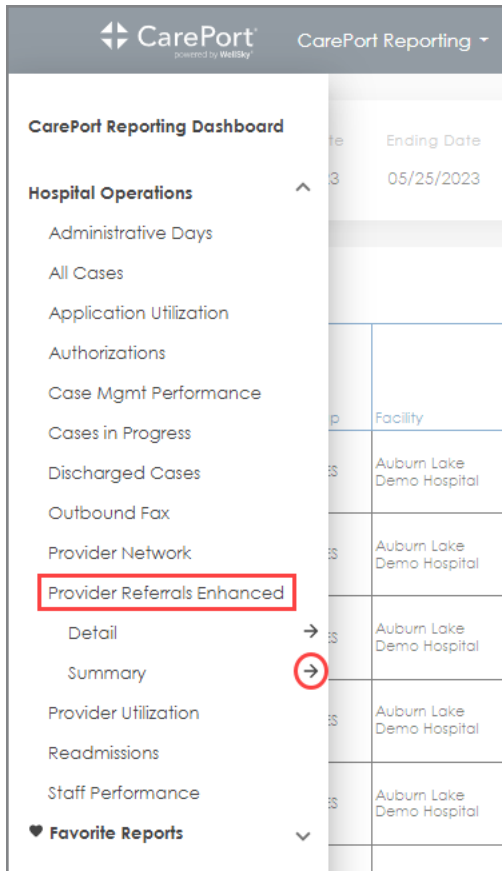
No	Facility Group	Hospital Name	Connected?	Provider ID	CMS Number	Provider Name	Provider Address	Provider City	Provider State	Provide Code
1	ALL FACILITIES	Auburn Lake Demo Hospital	Yes	3008222		Test Demo Cl SNF 3	275 grove st	CURASPAN CITY	ZZ	99999
2	ALL FACILITIES	Auburn Lake Demo Hospital	Yes	3008220		Test Demo Cl SNF 1	275 Grove St	CURASPAN CITY	ZZ	99999

An information icon with a '2' notification bubble is located in the bottom right corner of the report area.

- 3. Click the **next page** > icon to display additional report information.

Provider Referrals Enhanced Summary

1. Select the **Provider Referrals Enhanced** option within the expanded **Hospital Operations** section and then select the **Summary** option.



The **Parameters** window displays.

Parameters
✕

Hospital Operations: Provider Referrals Enhanced Summary

Starting Date 05/01/2023

Ending Date 05/25/2023

Facilities Auburn Lake Demo Hospital

Placement Types 5 selected

Patient Class All Selected

Levels Of Care All Selected

Time Zone EST

Favorite This Report ▾

Starting Date
05/01/2023

CANCEL RUN REPORT

- Enter or select search criteria for the required fields and when finished, click the **RUN REPORT** button. The **Provider Referrals Enhanced Summary** report displays.

CarePort powered by WellSky
CarePort Reporting ▾ Hospital Operations: Provider Referrals Enhanced Summary
⚙️

MENU

Starting Date 05/01/2023

Ending Date 05/25/2023

Facility Groups ALL FACILITIES

Facilities AUBURN LAKE DEMO HOSPITAL

Placement Types 5 selected

Patient Class 3 selected

Levels Of Care 45 selected

Time Zone EST

Page 1 of 2 ➤ Go to page

Provider Referrals Enhanced Summary Report

Cases Referred Between May 1, 2023 - May 25, 2023

	Connected / Unconnected	Total Referrals	Final Hospital Status		Final Provider Status							T Acc by Bc
			Total Booked	Total Cancelled	Total Responded	Total Accepted	Total Pending	Total Declined	Total Forwarded	Total Other Responses	Total Opened (No Action Taken)	
Total		25	5	20	10	5	2	5	0	0	15	
All Saints Nursing Center	Connected	2	0	2	0	0	0	0	0	0	0	2
Apple Grove Care Center	Unconnected	2	2	0	1	1	1	0	0	0	1	
BayCare HomeCare Test 13 DME	Connected	2	0	2	0	0	0	0	0	0	0	2
BayCare HomeCare Test 4	Connected	2	0	2	0	0	0	0	0	0	0	2
Concord Shores	Connected	2	0	2	2	2	0	0	0	0	0	0
Curaspan TEST DME	Connected	2	0	2	0	0	0	0	0	0	0	2
Dignity Health Training DME	Connected	2	0	2	0	0	0	0	0	0	0	2

- Click the **next page** ➤ icon to display additional report information.

- To view the **Detail** report for a **specific provider**, click the [number](#) link within the **Total Referrals** column.

	Connected / Unconnected	Total Referrals
Total		25
All Saints Nursing Center	Connected	2

The **Provider Referrals Enhanced Detail Report** displays for the selected provider.

The screenshot shows the CarePort reporting interface. At the top, there is a navigation bar with the CarePort logo and the text "CarePort Reporting - Hospital Operations: Provider Referrals Enhanced Summary". Below this is a filter bar with various options like "Starting Date", "Ending Date", "Facility Groups", etc. The main content area displays the "Provider Referrals Enhanced Detail Report" for "Cases Referred Between May 1, 2023 - May 25, 2023". A table with 11 columns is shown, including "No", "Facility Group", "Hospital Name", "Connected?", "Provider ID", "CMS Number", "Provider Name", "Provider Address", "Provider City", "Provider State", and "Provide Code". The "Provider Name" column for all three rows is highlighted with a red box. On the right side of the table, there are navigation icons: a left arrow, a download icon, and a heart icon. At the bottom right, there is an information icon with a "2" next to it.

No	Facility Group	Hospital Name	Connected?	Provider ID	CMS Number	Provider Name	Provider Address	Provider City	Provider State	Provide Code
1	ALL FACILITIES	Auburn Lake Demo Hospital	Yes	171450	225007	All Saints Nursing Center	13 Blossom Road	XANADU	ZZ	00304
2	ALL FACILITIES	Auburn Lake Demo Hospital	Yes	171450	225007	All Saints Nursing Center	13 Blossom Road	XANADU	ZZ	00304
3	ALL FACILITIES	Auburn Lake Demo Hospital	Yes	171450	225007	All Saints Nursing Center	13 Blossom Road	XANADU	ZZ	00304

- Click the **next page** > icon to display additional report information.

Provider Referrals Enhanced Report Glossary

Field	Description
Start and End Date*	The start and end dates are based on the referral date.
Actual Start of Care Date/Time	Indicates the date and time that post-acute care begins.
Booking Made Flag?*(Referral Level)	<ul style="list-style-type: none"> Indicates whether a referral made to a specific post-acute provider was booked. Possible values are Yes and No. Yes displays when the case was booked with the post-acute provider.
Connected Flag?*	<ul style="list-style-type: none"> Indicates whether the post-acute provider receives referrals electronically through an application such as CarePort Intake. Possible values are Yes and No.
CMS Number	The CMS Certification Number is the six-digit Medicare certification number assigned to a facility by the Centers for Medicare and Medicaid Services.
Discharge Disposition Code*	The discharge disposition code received via the ADT interface from the hospital information system (HIS).
Discharge Disposition Description*	The discharge disposition description received via the ADT interface from the hospital information system (HIS).
Facility Group *	The corporate division or grouping to which a hospital is assigned.
Final Hospital Status * (Round Level)	The status of the final hospital transaction within the current referral round.
Final Hospital Status Date / Time * (Round Level)	The date and time of the final hospital transaction within the current referral round.
Final Provider Status * (Round Level)	The status of the final post-acute provider transaction within the current referral round.
Final Provider Status Date / Time * (Round Level)	The date and time of the final post-acute provider transaction within the current referral round.
Hospital Name*	Indicates the name of the hospital that sent and booked referrals and performed discharges for its patients.

Field	Description
Level of Care*	<ul style="list-style-type: none"> The level of care (LOC) corresponds to the LOCs selected for the encounter during the REFER stage for sending out referrals to post-acute providers within CarePort Discharge. A patient encounter could have one or more levels of care. Typically, the LOCs correspond to all types of post-acute care that the patient required after leaving the hospital.
Local Accept Date and Time * (Round Level)	This indicates when the hospital first accepted the response from the post-acute provider within the current referral round.
Local Admit Date*	The patient's actual admit date received via the ADT interface from the hospital information system (HIS).
Local Discharged Date*	The patient's actual discharge date received via the ADT interface from the hospital information system (HIS).
Local Estimated Discharge Date*	Estimated discharge date captured by the case manager through CarePort Discharge .
Local Referral Date and Time* (Round Level)	Indicates when the referral was sent to the provider.
Local Response Date and Time * (Round Level)	This indicates when the post-acute provider first responded to the hospital within the current referral round.
Patient Account Number*	The patient's episode identifier received via the ADT interface from the hospital information system (HIS).
Patient Class*	Indicates the type of patient that received discharge services: <ul style="list-style-type: none"> (I) for inpatient discharges, (O) for outpatient discharges or (E) for emergency room discharges.
Patient Date of Birth*	The patient's date of birth (DOB) as indicated by the hospital information system (HIS).
Patient First Name*	The patient's first name received via the ADT interface from the hospital information system (HIS).
Patient Last Name*	The patient's last name received via the ADT interface from the hospital information system (HIS).

Field	Description
Patient MRN*	The Medical Record Number (MRN) received via the ADT interface from the hospital information system (HIS).
Placement type*	<ul style="list-style-type: none"> The application's internal code which indicates the type of patient placement: <ul style="list-style-type: none"> Facility, Transfer, Home Care, Home (Routine) or Other. These codes are mapped to the discharge disposition codes that are received from the ADT feed. The placement type codes are used for identifying patient encounters that required discharge services. Thus, it's important that disposition code mappings are accurate and kept up to date.
Primary Contact*	The last person (concatenation of last name and first name) who was assigned as the primary contact for the patient encounter.
Primary Diagnosis*	The condition or ailment for which a patient is initially admitted to the hospital for care.
Primary Payer*	The principal insurance company responsible for compensating a healthcare provider for a patient's services.
Primary Payer Type*	The payer classification of the source of payment for principal insurance company responsible for compensating a healthcare provider for a patient's services. E.g., Medicare, Medicaid
Provider Address*	The street address for the post-acute provider as listed in our Provider Data Bank.
Provider City*	The city for the post-acute provider as listed in our Provider Data Bank.
Provider ID*	The internal provider identification number assigned to a post-acute provider by the application.
Provider Name*	The post-acute provider's name as listed in our Provider Data Bank.
Provider State*	The state for the post-acute provider as listed in our Provider Data Bank.
Provider ZIP Code*	The ZIP code for the post-acute provider as listed in our Provider Data Bank.

Field	Description
Refer to Accept Time Minutes * (Round Level)	This number of minutes, to two (2) decimal places, that it took the hospital to first accept a response from the post-acute provider within the current referral round.
Refer to Response Time Minutes (Round Level)	This number of minutes, to two (2) decimal places, that it took the post-acute provider to respond to the hospital within the current referral round.
Referral Workflow (GMT Time)	<ul style="list-style-type: none"> • A listing of all the hospital and post-acute provider statuses that took place during a round of referrals. • The statuses are listed in chronological order with each status prefixed by either HOSPITAL or PROVIDER. • The year is not shown in the workflow and all times are shown in GMT.
Round Number *	<ul style="list-style-type: none"> • The number of rounds for this referral. • A round is defined as all transactions that take place after a hospital has requested service from a post-acute provider up to when the hospital reopens the case. • Transactions can be from the hospital side or the post-acute provider side.
Standard Decline Reason* (Referral Level)	The reason selected by the post-acute provider for declining a referred case.
Unit*	<ul style="list-style-type: none"> • Indicates the current or last hospital unit to which the patient was assigned. • This information is received via the ADT interface from the hospital information system (HIS).
UniqueTag	Displays list of different tags for the patient

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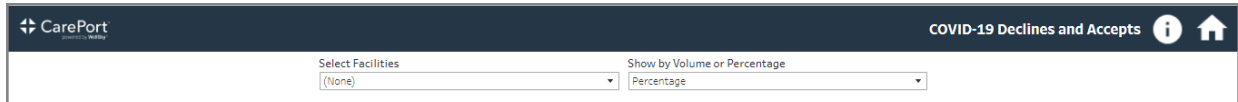


Appendix: COVID-19

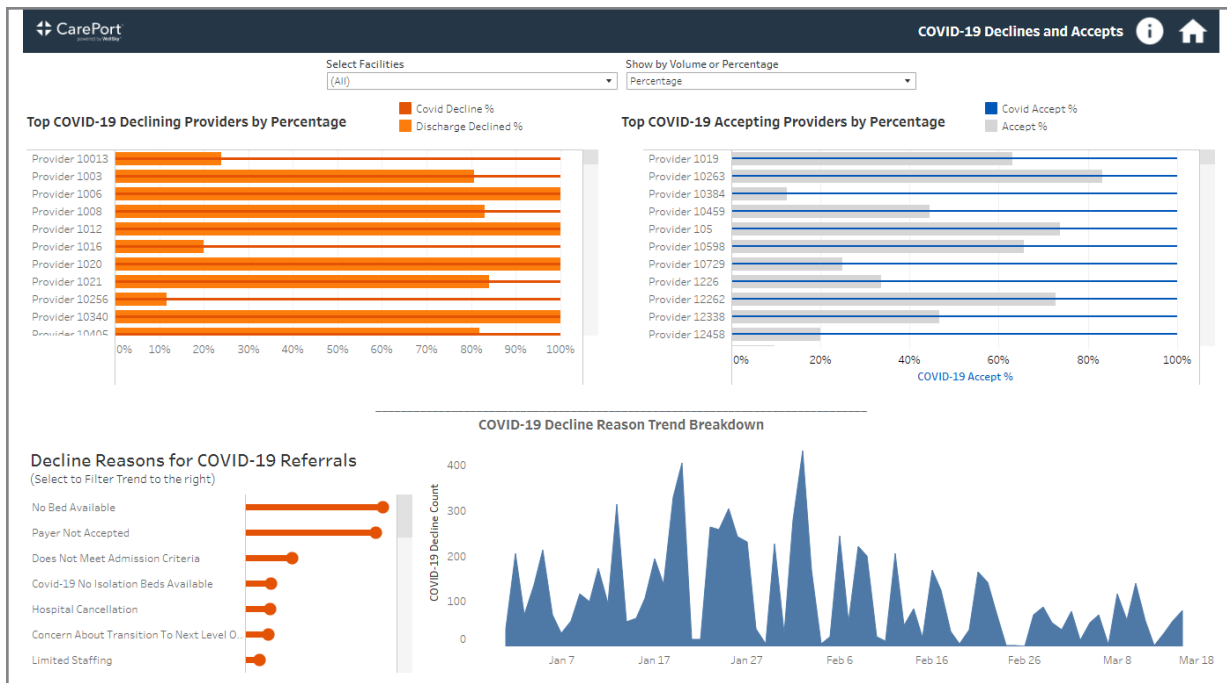
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COVID-19 Facility Declines and Accepts Dashboard

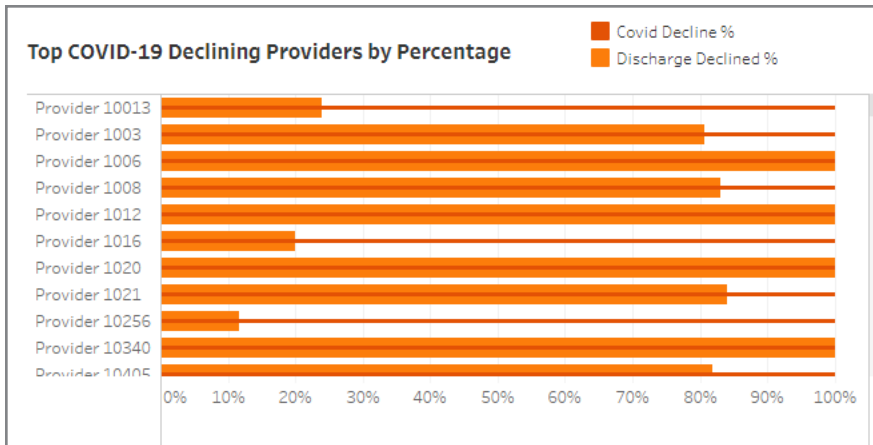
1. Click the [COVID-19 Facility Declines and Accept](#) link within the Landing Page. The dashboard header displays.



2. Select the desired **Facilities** and click the **Apply** button.
3. Select the option within the **Show by Volume or Percentage** field. This dashboard displays the **accept** and **decline** metrics compared to standard referrals along with decline reasons across multiple providers.

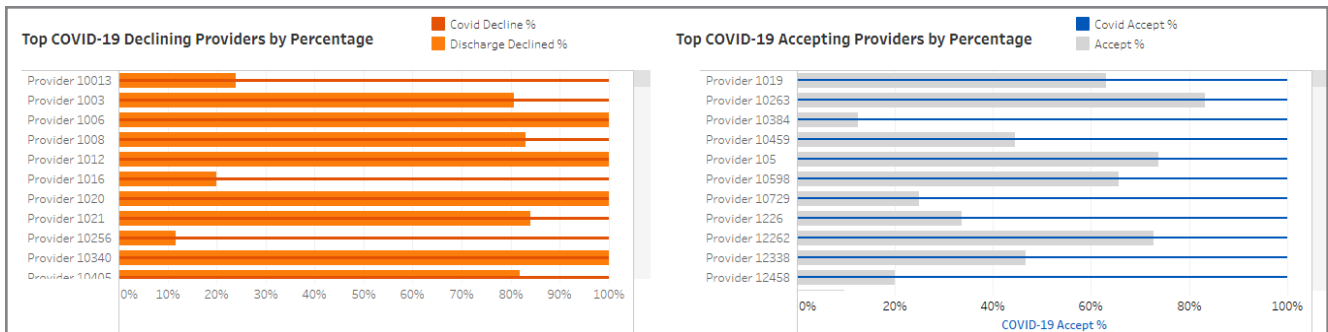


Leveraging COVID-19 diagnoses and COVID-19 tagging, this dashboard displays how many COVID-19 patients you are discharging over time, and how your post-acute care partners are responding to those referrals.



Are PAC Facilities Responding to Your COVID-19 Referrals?

The Accept and Decline charts present comparisons of the percentages or raw totals of COVID-19 referrals being accepted and being declined to the overall Accept and Decline percentages or raw totals for all the referrals you sent to each post-acute care provider.



Decline Reasons for COVID-19 Referrals

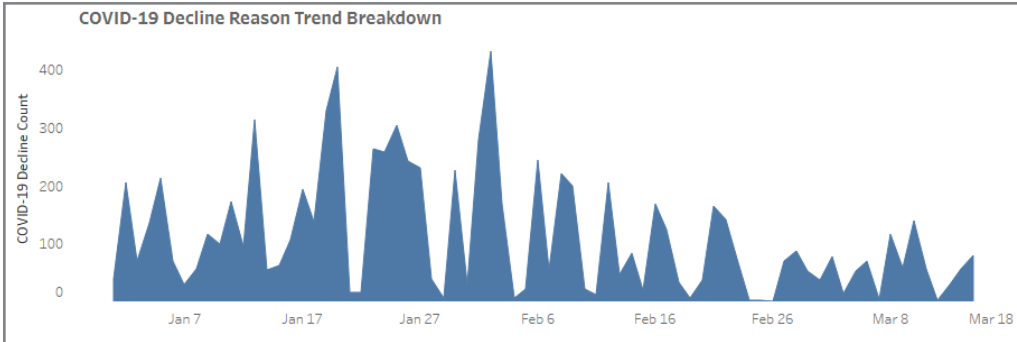
This graph reveals the decline reasons provided for each COVID-19 diagnosed or tagged patient referrals. We isolated decline reasons for these referrals to show you why post-acute care providers are declining COVID-19 diagnosed or tagged referrals.

Hover over each orange bar to see the raw number of declines for that reason.

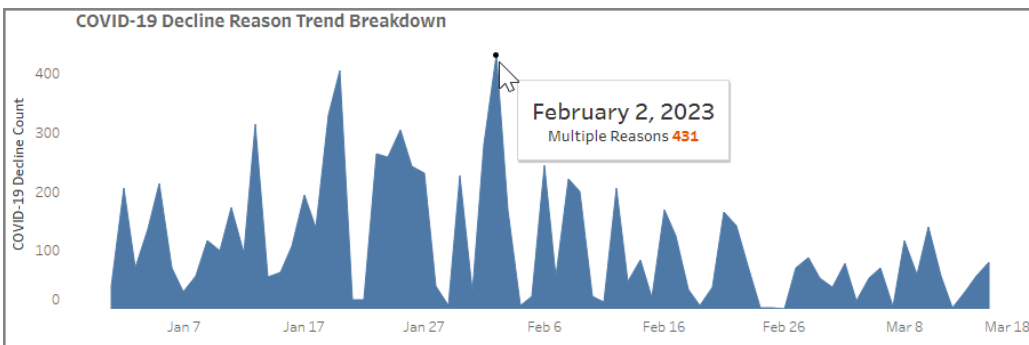


Decline Reason Trend Breakdown

The Decline Reason Trend Breakdown displays weekly declines over time assigned for COVID-19 diagnosed referrals.



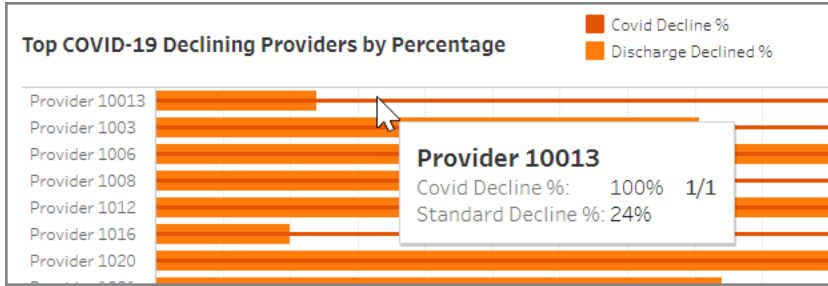
Hover over a day in the graph to see how many COVID-19 referrals were declined on that day.



Top COVID-19 Declining PAC Providers by Percentage/Number

This graph establishes the percentage or number of COVID-19 diagnosed referrals compared to the overall declined referrals per PAC facility.

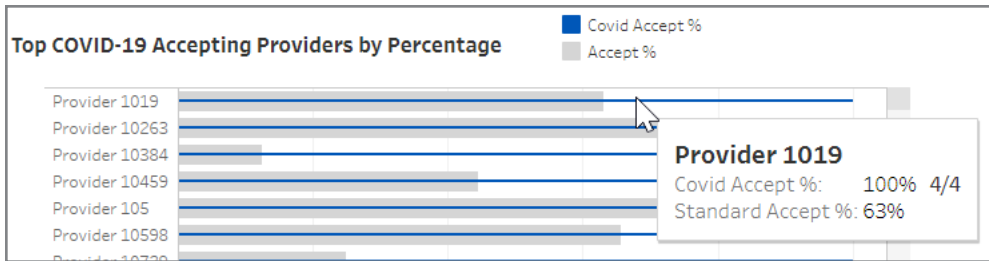
- The **red** bar indicates the number of COVID-19 referrals.
- The orange shading indicates the total number of non-COVID-19 referrals.
- Hover over a data bar to display the numbers behind that data.



Top COVID-19 Accepting PACs by Percentage/Number

This graph illustrates the percentage or number of COVID-19 diagnosed referrals that are accepted compared to the overall accepted referrals per post-acute care facility.

- The **blue** bar indicates the number of COVID-19 referrals.
- The **grey** shading indicates the total number of non-COVID-19 referrals.
- Hover over a data bar to show the numbers behind the data.



COVID-19 Facility How we Calculated

Flag referrals as COVID-19 if the **COVID-19 tag** is applied to a patient within **CarePort Discharge** or both of the following conditions are met:

- The **Primary Diagnosis** field contains any of the following keywords: **COVID** or **CORONA**.
- The **Primary Diagnosis** field does not contain any of the following keywords: **NEGATIVE** or **RULED OUT** (or other variants).

COVID-19 State and County Data

Tableau

The data within Tableau originates from the dataset maintained and updated by the John Hopkins University Center for Systems Science and Engineering. Tableau cleans, reshapes, and makes this data ready for your analysis.

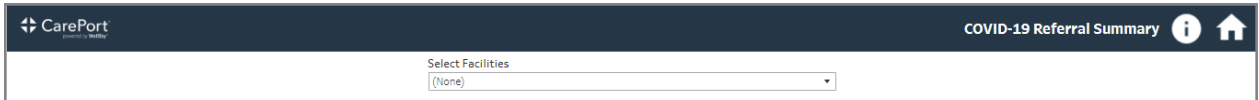
John Hopkins

The data is sourced from any of the following state and national government health departments, as well as any local media reports.

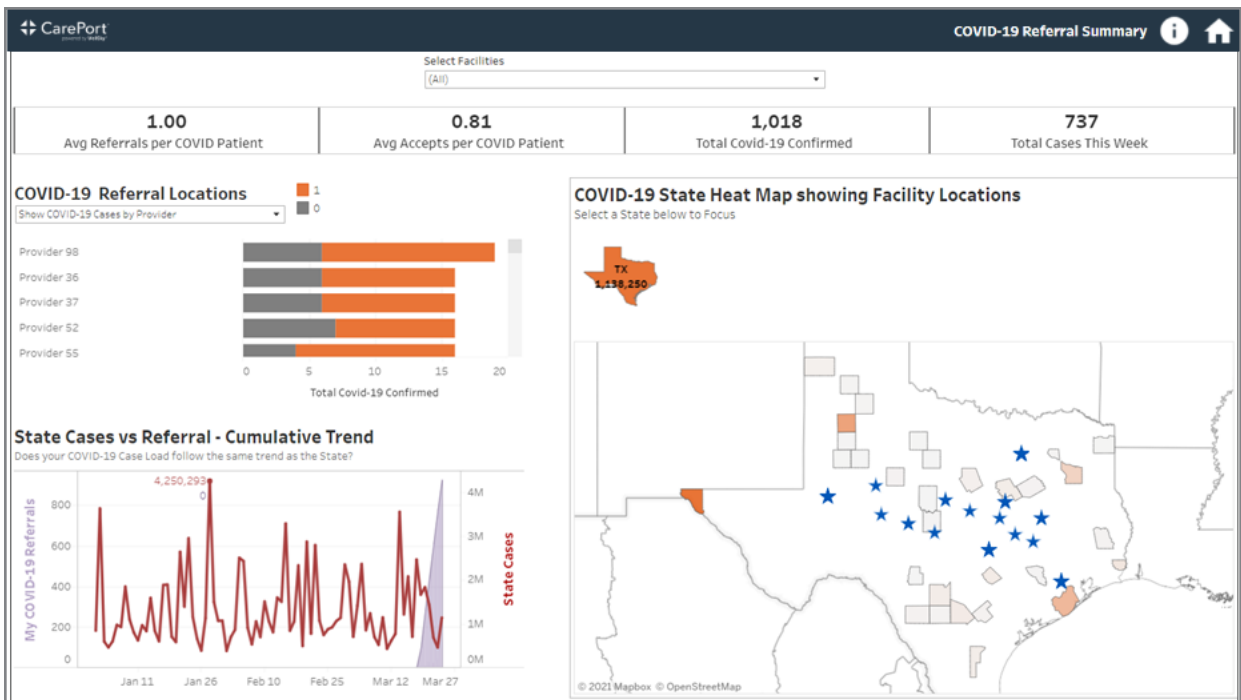
- WHO
- CDC
- ECDC
- NHC
- SXY
- 1point3acres
- Worldometers.info
- BNO
- the COVID Tracking Project (testing and hospitalizations)

COVID-19 Facility Referral Summary

1. Click the [COVID-19 Facility Referral Summary](#) link within the Landing Page. The dashboard header displays.



2. Select the desired **Facilities** and click the **Apply** button. This dashboard is designed to provide trends in your acute care facility's referrals for COVID-19 diagnosed patients.



At a glance it presents:

- High level metrics on your facility's COVID-19 referrals,
- How many COVID-19 referrals your facility sent to each PAC provider,
- How your facilities are trending in comparison with state averages, and
- How many cases are confirmed in your facilities' counties and states.

The other graphs display how COVID-19 referrals:

- Are trending for each of your organization's facilities,
- How your data compares to that of the state, and
- Where your organization's facilities are located geographically in comparison to your state's COVID-19 hot spots.

COVID-19 Summary Referral Bar

This is your “at-a-glance” analysis for your COVID-19 referrals for your selected facilities.

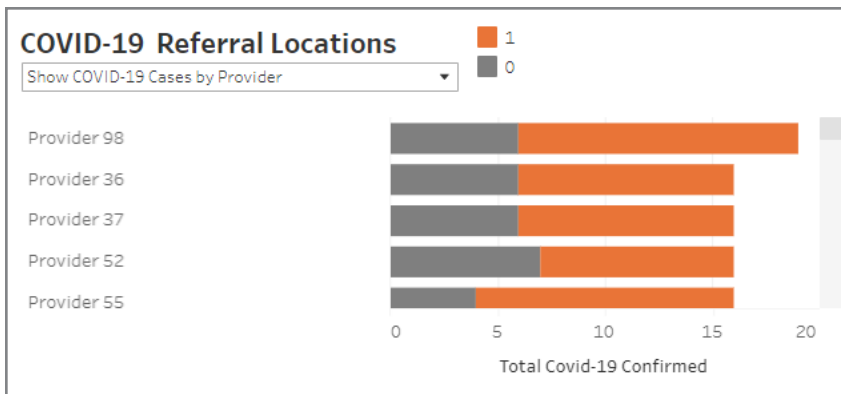
1.00 Avg Referrals per COVID Patient	0.81 Avg Accepts per COVID Patient	1,018 Total Covid-19 Confirmed	737 Total Cases This Week
--	--	--	-------------------------------------

It displays how many:

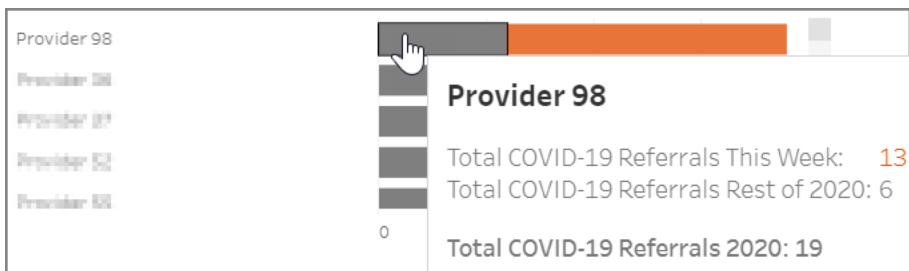
- Referrals on average your facility sent for each COVID-19 tagged or diagnosed patient,
- Accepts you received from PAC providers per patient,
- COVID-19 referrals sent overall, and
- COVID-19 referrals sent this week.

The COVID-19 Referral Locations Graph

This graph can display either your COVID-19 referrals sent by each of your selected facilities, or your COVID-19 referrals sent to specific post-acute care provider(s).



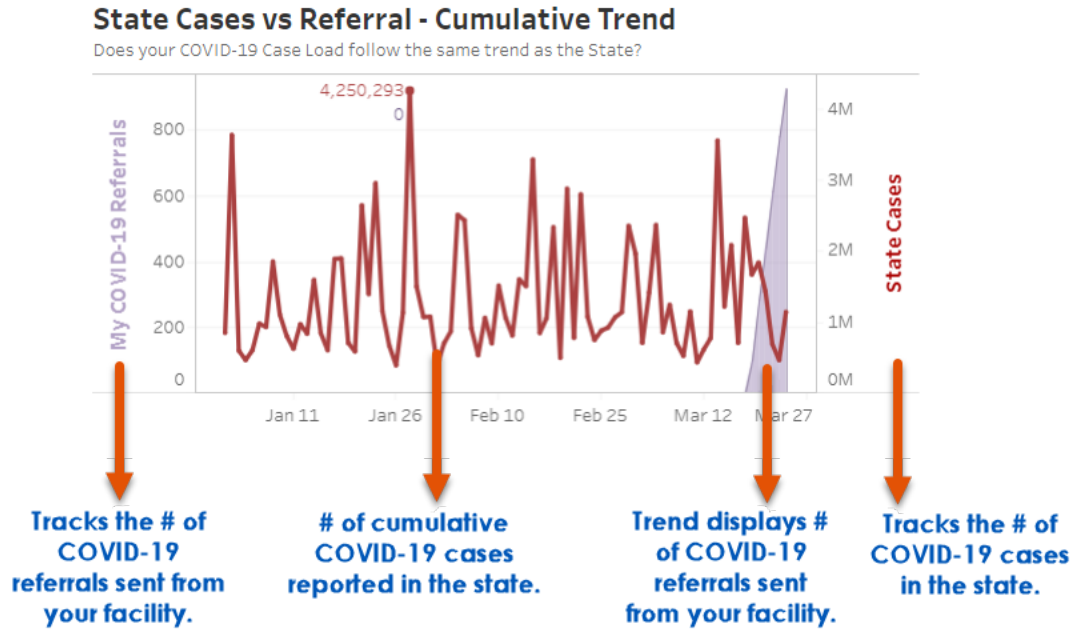
- The **gray** portion of the bar shows your cumulative COVID-19 referrals sent the past week.
- The **orange** portion shows the added referrals within the last week.



This view is designed to visually demonstrate how your recent COVID-19 referral volume compares to your organization overall, and to understand where your facility is in the overall COVID-19 trend curve. Hover over an individual data bar to show the actual data behind that bar.

The State Cases vs Your Referrals – Cumulative Trend

This graph reflects how the selected facilities within your organization compare regarding COVID-19 referrals to the total number of COVID-19 referrals in the state.



The COVID-19 Heat Map

This graphic is designed to show geographically where your organization’s facilities are in relation to the highest density of COVID-19 cases in the state.

- The selected facilities are represented by blue stars.
- The intensity of the orange color indicates the number of COVID-19 cases in that county.
 - Hover over the **facility** to display its name.
 - Hover over the **county** to show the total number of confirmed COVID-19 cases in that county.

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Glossary

– A –

All Cases Report

This report displays patient information by their discharge date or by their referral date.

Application Usage Analysis

This dashboard offers insight into overall usage and process completion trends within CarePort Discharge. The measures are based by default on cases that required services (those with a placement type of Facility, Transfer or Home Care).

– C –

CarePort Reporting Dashboards Landing Page

Displays a list of multi- and single-facility dashboards focused on CarePort Discharge data.

Cases in Progress Report

This report displays the total amount of patient cases for the timeframe selected from the Parameters window. Additionally, it displays how many of those patient cases were referred, not referred, booked, and not booked. This report presents as a table view and provides a summary view.

Community Referral

Use the Community Referral dashboard to view a detailed summary for referrals sent to community-based providers using CarePort Community.

COVID-19 Facility Declines and Accepts

This Multi-Facility dashboard displays COVID-19 accept and decline metrics compared to standard referrals along with delined reasons across multiple providers.

COVID-19 Facility Referral Summary

A Multi-Facility dashboard that provides COVID-19 referral trends across multiple providers.

– D –

Date Dimensions

The increase and decrease icons allow you to view data in longer or shorter time periods.

Decline Analysis

This dashboard displays various forms of analysis for post-acute care provider declines received by one hospital.

Discharge Summary

This dashboard provides CarePort Discharge information and summarization across multiple facilities. It provides an organization-wide perspective for the comparison of hospitals and how

the post-acute care providers are responding to their referrals.

– F –

Facility Filter

The acute care Facility filter displays all acute care facilities in your system or Integrated Delivery Network (IDN), allowing you to change your dashboard data view to any single facility in your system or multiple facilities.

– H –

Hospital Operations Reports

Hospital Operations reports are a standard offering within CarePort Discharge. The starting date and ending date parameters for the Hospital Operations Reports only include dates within the past 25 months.

– M –

Multi-Facility Decline Analysis

Use the Multi-Facility Decline Analysis dashboard to view declined referral trends across multiple facilities.

– N –

Network Analysis

Use the Network Analysis dashboard to view referrals in provider network and referrals outside of provider networks across multiple referral sources (Facilities).

Network Summary

The Network Summary dashboard provides a view of referral information within a provider network and referrals outside of provider networks for a single selected facility. This dashboard provides a summary of referrals for individual facilities.

– P –

Patient Details

This Single-Facility dashboard provides an analysis of patients at a specific facility.

Provider Referrals Enhanced Report

This report displays details of the providers who were sent referrals and presents a table view of the providers who were sent referrals and summarizes the numbers for hospital statuses and provider statuses.

– R –

Readmission Analysis

This dashboard highlights the readmission trends over time across facilities and post-acute care providers. Previously, the Placement Type filter showed multiple values for Unknown. Effective April 21, 2022, these values now roll up into a single Unknown value.

Referral Trend

This Multi-Facility dashboard provides an analysis of referral trends for multiple facilities.

– S –

Single-Facility Dashboards

These dashboards provide perspectives for specific facilities and how the post-acute care providers are responding to their referrals.

– T –

Tableau Toolbar

The dashboards are presented with the Tableau application and this toolbar provides options within the bottom of each dashboard's screen.

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