

CarePort Intake makes managing patient referrals and measuring performance a much simpler and quicker process by securely connecting to hospitals using our **CarePort Discharge** application and allows users to input and manage referrals from any other referral source.

## How do I log in the first time?


1. Enter <https://network.curaspan.com/connect/commonservices/> into the **address** field of a browser window and press the **[Enter]** key on your keyboard.
2. Enter your username and *temporary* password. You are prompted to create a new password.
3. Enter a new password containing **eight** (8) characters, with at least **one** (1) uppercase letter and **one** (1) number. **Example:** Welcome1




**NOTE** – CarePort Intake requires you to then log in with your new password. After logging in with your new password, you are prompted to update your profile and security questions.

4. Enter your primary facility phone number.
5. Enter an account recovery email address.
6. Enter your time zone and select the radio button to indicate if you observe Daylight Savings Time (DST).
7. Select and answer **four** (4) security questions. These are required for account recovery in the event you forget your password.
8. Click [Save](#).

## How do I update notifications via text or email?

1. Click the **COG**  icon within the upper right-hand corner of the screen and select the **Change Notification Settings** option from the drop-down menu.
2. Update your **Notification Methods** to receive notifications by your facility email or text message using your facility-provided cell phone.
3. Update your **Notification Sources** to receive notifications for:
  - Referrals from all referral sources
  - Updates to any of your facility's referrals
  - Incoming referrals from specific acute facilities
  - Update your Notification Types.
  - Do you want to be notified when you have a new referral?

- Do you want to be notified when you have a status update?  
(**Example:** Booked, Cancelled, Suspended, Delayed, Reopened)
- Do you want to be notified when you have new messages from the care team?
- Do you want to be notified when you have updated documents for a referral?
- Do you want to be notified when you have new messages in internal notes?
- Do you want to receive notifications in the mobile app? If so, click the  to turn on the notification to receive push notifications within the app.
- Click [Save](#).

## Why should I update my information on the Profile tab?

Yes, your organization should maintain its profile because this is what the hospital sees while making referrals and what the care team can share with the patient. Your organization's profile highlights the levels of care, clinical services, clinical team members, secondary services, service areas, and payers your facility can accept.

### Bedded Facilities

1. Click the [PROFILE](#) tab at the top of the screen. The CarePort Guide application opens and displays in a separate browser tab.

You can view and edit the profiles for all the facilities for which you have access in your organization. The columns on the [Guide Profile Landing Page](#) display the facility's Level of Care, Profile completion percentage, and Bed Availability status for your bedded facilities.

2. Within the **Provider Name** column, click the name of your bedded facility. The first profile section, **Basic Info** displays.
3. Complete all the fields and click **Save & Continue**. The **Services** section displays.
4. Select the appropriate radio button to indicate services you provide or do not provide.



**WARNING** – Do not leave a service marked **Unknown**. Your facility's profile will remain incomplete until you select **Yes** or **No**.

5. Scroll down the list to ensure you mark each service option.
6. Click **Save & Continue**. The **Insurance** section displays.
7. Select accepted insurances, which allows your facility to be searchable by insurance payor and plan types.
8. Click **ADD PAYOR**.

An extra screen displays for the selected insurance payor listing the following possible plan types.

- Medicare Advantage
  - Medicaid
  - Commercial
  - Dual Eligible
9. Indicate the arrangement with the selected insurance payor by selecting the appropriate option for each plan type.
  10. In the open text field below each arrangement selection, enter any plan type details.
  11. Click **Save & Continue**. The **Amenities** section displays.
  12. Select the check box(es) to the left of all the amenities your facility provides and click **Save & Continue**. The **Photos** section displays.
  13. Click **Upload** to navigate to and select a photo file from your computer.  
OR  
Drag and drop a photo file from your computer into the gray highlighted section.
  14. Click the [ADD CAPTION](#) link to add a name for the photo, if desired.
  15. Click **Save & Continue**. The **Facility Details** section displays.
  16. Complete all fields in this section. This is where you can make your facility stand out.
  17. Click **SAVE**.

## Non-Bedded Facilities

The non-bedded facilities have the same sections for completion as the bedded facilities, except for the **Coverage Area** and **Organization Details** sections.

## I updated my profile and I'm ready to use CarePort Intake. What should I look for on my dashboard?

The **CarePort Intake** dashboard displays all your referrals from participating acute facilities, separating the referrals into the five (5) categories outlined on the next page.

- NEW** Lists all referrals that are **new** to your facility. No one in your organization has taken any action on these referrals. By default, the **NEW** referral status tab displays by default when the application is launched.
- INPROGRESS** Referrals, which have been opened by someone at your facility.
- ACCEPTED** All referrals for which your facility has selected the **Accept** status.
- BOOKED** This tab reflects any referrals that have been **BOOKED**, even ones that have not been **ACCEPTED** yet.
- DECLINED** All referrals for which your facility has selected the **Decline** status.
- REOPENED** If the acute facility cancelled the referral and then re-opened it, this reactivates the referral within **CarePort Intake**.




Sort your dashboard by the following options:

- Last Updated
- Alphabetical
- Act. Discharge Date
- Est. Discharge Date
- Payer Name
- Antic. Start of Care
- Unread Messages
- Unread Documents
- Unit/Room/Bed

Filter your dashboard with the following options.

- ALL PROVIDERS** Multiple Post-Acute Care facilities for which you have access.
- LEVEL OF CARE** Levels of Care provided by your organization.
- ALL REFERRAL SOURCES** Search for and select Acute facilities.

## I noticed several different icons for various referrals on my dashboard. What do these mean?

-  Unread documents for the referral.
-  Unread messages from acute facilities using **CarePort Discharge**.
-  Subscribe yourself or a colleague to a patient in **CarePort Intake**. Subscribing to patients enables you access to a shortlist of patients.

## I clicked a patient card on the dashboard. Where is this referral information derived?

You are looking at the **Patient Details** screen. The information displayed is pre-populated from the acute facility's Electronic Medical Record (EMR).

## I used to receive a physical document via fax with all the clinical information. Where do I find my new referral packet?

Your new electronic referral packet is housed within the **DOCUMENTS** tab at the bottom of the **Patient Details** screen. Case Managers at the acute facility build referral packets containing clinical documents within **CarePort Discharge** and send these electronically to you.

## I have a couple of questions I need to ask the care team. Do I need to call them?

From the **CONNECT** tab at the bottom of the **Patient Details** screen, click the **MESSAGES** button within the **Communication** column to send a secure message to the referring acute facility's care team.

## I'm ready to let the hospital know my status on the referral. How do I accomplish this?

From the **CONNECT** tab at the bottom of the **Patient Details** screen, click **SET STATUS** within the **Actions** column to send a determination to the referring acute facility.

<b>Accept</b>	If you are a bedded facility, you can receive the patient or otherwise provide the Level of Care for the patient.
<b>Decision Pending Authorization</b>	You are waiting for authorization from your organization or an insurance provider before you can accept or decline the referral.
<b>Decision Pending Bed Availability</b>	You are waiting for a bed to become available before you can accept or decline the referral.
<b>Decision Pending Review</b>	You are waiting for more information before you can accept or decline the referral.
<b>Decline</b>	You are not able to take the patient at your facility.
<b>Request More Information</b>	You need more information from the referral source.

## How can I look at metrics regarding my organization's performance and my partnership with referral sources?


1. Click the **CarePort Reporting** tile upon login.
2. Within the **Reports** window, click the **Intake Bundle** tab.
3. Select the **Intake Referral** option.
4. Click the **Intake Referral by Provider** option.

5. Select or enter search criteria within the **Parameters** window that displays.
6. Click **RUN REPORT** located in the lower right-hand side of the window.


## How do I archive a patient to keep my dashboard organized and active?

1. Select a patient card from your dashboard.
2. When the **Patient Details** window displays, scroll to the **bottom** of the window where the **CONNECT** tab is selected by default.
3. Select the check box to the left of the provider's name who received the referral you wish to archive. A **checkmark** displays.
4. Click **ARCHIVE**. The **Archive Referral** window displays, confirming your desire to remove the provider from the patient's referral.
5. Click **REMOVE**. The referral is moved to **Archive** for **seven (7) years**.

## Where can I view the archived referrals?

1. Click **ARCHIVE** within the top-level navigation toolbar. The **Search Archived Referrals** window displays.
2. In the **Search by Patient Name** field, enter the patient's first name, last name, or both first and last name and click the . The system displays a name or a list of names matching the entered name.
3. Click the name within the **gray** highlight. The **Search Results** display for the entered name with the user displaying at the top of the table.
4. To reactivate the archived referral, click **REACTIVATE** to return the archived patient card to your dashboard.
5. If the reactivated referral was originally **declined**, then open the patient's record and scroll to the **CONNECT** section. Click **SET STATUS** within the **Actions** column and click **REOPEN REFERRAL**.


## I'm a Basic User Administrator (BUA), how can I manage my organization's user accounts?

1. Click  located in the upper right-hand corner of any screen.
2. Select the **Admin** option from the drop-down menu. The **User Management** screen displays with the **MANAGE USERS** tab selected by default.
3. Perform any of the following actions for users at your facility.

## Add a New User

1. Within the **User Management** screen, click **ADD NEW USER**. The **Add New User** window displays.
2. Complete all required fields denoted with an asterisk (\*).
3. Click **NEXT**. The **Add New User – Select Organizations** window displays.
4. Click **SAVE**.

## Reset User Passwords


1. From the **Manage Users** screen, click  under the **Actions** column.
2. When the **Reset Password** dialog box displays, enter the new password, and enter a second time to confirm. A user's password must be at least **eight** (8) characters long and include at least one (1) uppercase letter and one (1) number.
3. Click **UPDATE PASSWORD** to finish.

## Activate an Inactive User

To activate a user that has not signed in for a certain length of time, click the **red inactive** button. The button is now **green**.

## Disable a User

If a user leaves your organization, you must **disable** their account.

1. Click his or her name within the list on the **Manage Users** screen. The **User Detail** screen displays.
2. Click .