



CarePort Transition

User Guide

Published Date: 3/29/23 CarePort © powered by WellSky© Transition

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Transition

The CarePort® Transition solution integrates with Epic® to:

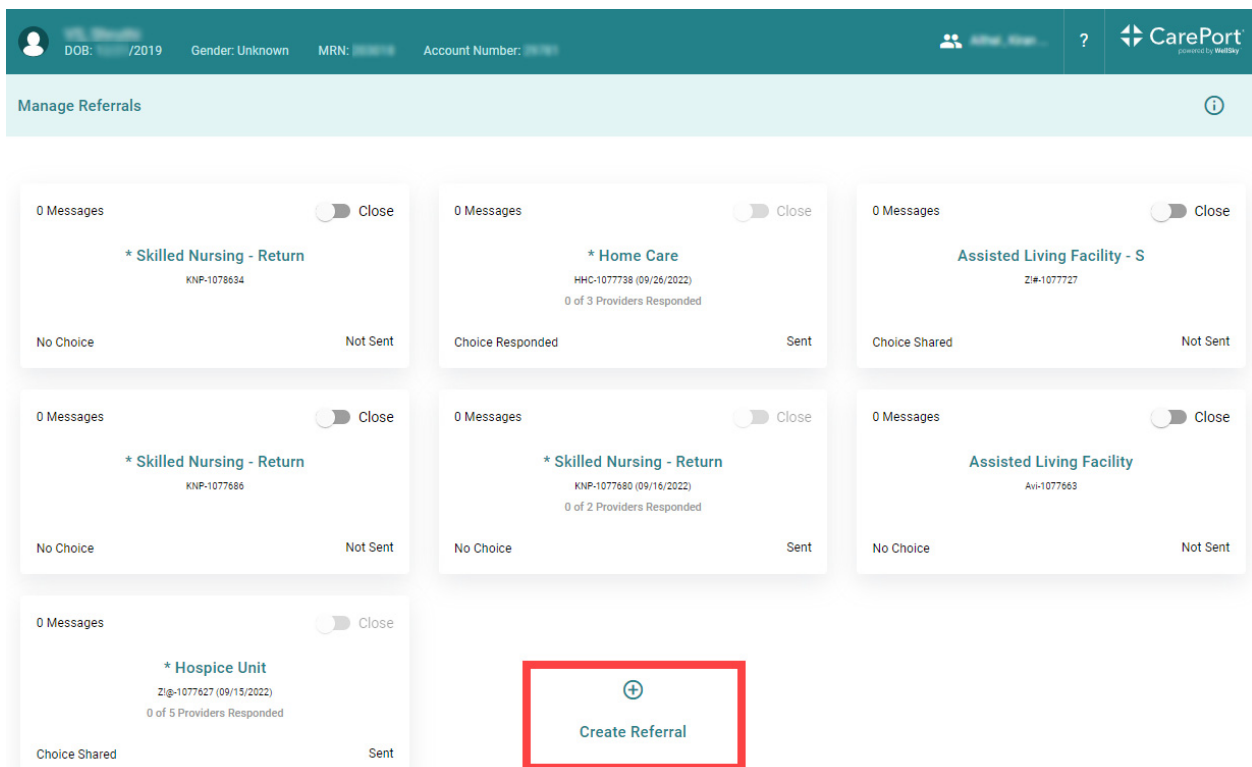
- Streamline creating, sending and managing post-acute referrals from directly within your EHR for a more efficient care transition process
- Seamlessly incorporate clinical data into the referral packet with flexible integration offerings
- Receive email notifications and alerts on all referral activity, including acceptances and declines
- View available information such as quality and resource use measures, preferred provider networks, clinical services, accepted insurances, photos and more

Starting a Referral

Transition has features for users to customize a patient’s referral before sending it off to specific providers. This guide provides details on how to gather patient choice, how to create and send a referral to providers, and how to finalize referrals.

Complete the following to start a referral for a patient:

- 1) Navigate to the patient chart in Epic®.
- 2) Select the CarePort Transition link from the navigator to launch the Transition solution.
- 3) On the **Manage Referrals** screen, click **Create Referral**.



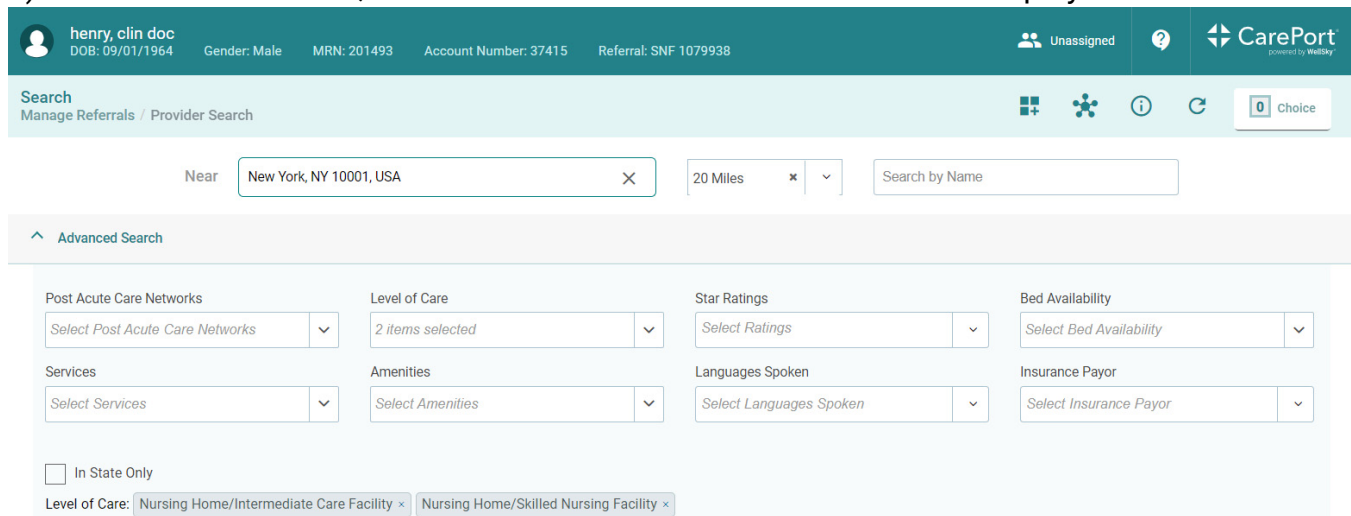
- 4) On the **Create Referral** window, scroll and select the relevant referral type, then click **Create Referral**. The **Referrals** screen displays.
Info: These referral types are configured for your specific organization and help define the providers.
- 5) The following sections will detail how to use the following tabs in **Transition**:
 - **Providers**
 - **Shared Choice**
 - **Information**
 - **Clinical**
 - **Forms**
 - **Attachments**
 - **Send**

Providers

In the **Providers** tab, users can search for providers, manage provider rank, view information about selected providers, and select providers to be added to a referral.

To search for and add a provider:

- 1) In the **Providers** tab, click **Search Providers**. The **Search** screen displays.



henry, clin doc
 DOB: 09/01/1964 Gender: Male MRN: 201493 Account Number: 37415 Referral: SNF 1079938 Unassigned CarePort powered by WellSky

Search Manage Referrals / Provider Search Choice

Near New York, NY 10001, USA 20 Miles Search by Name

Advanced Search

Post Acute Care Networks: Select Post Acute Care Networks
 Level of Care: 2 items selected
 Star Ratings: Select Ratings
 Bed Availability: Select Bed Availability
 Services: Select Services
 Amenities: Select Amenities
 Languages Spoken: Select Languages Spoken
 Insurance Payor: Select Insurance Payor

In State Only
 Level of Care: Nursing Home/Intermediate Care Facility x Nursing Home/Skilled Nursing Facility x

- 2) On the **Search** screen, complete the following:
 - a) The **Search** screen contains the following filters you can use to search for a provider:
 - **Post Acute Care Networks**
 - **Level of Care**
 - **Star Ratings**
 - **Services**
 - **Languages Spoken**
 - **Insurance Payor**
 - **Search by Address**

- **County**
- **In State Only**
Note: At the top of the screen, you must enter either a zip code, state, or Post Acute Network name to complete the provider search. Your organization will be configured to default either the patient's zip code or their city/state.
Tip: To hide the provider search fields, select **Advanced Search**.

 [Advanced Search](#)

Provider Details

When using the Provider Search in Transition, users can select listed providers to see expanded information before adding them to patient choice. This information displays in the **Provider Details** window.

In the **Provider Details** window, basic provider information displays such as name, location, contact information, provider website link, etc. Users can also click the **Virtual Tour** button on select providers see a more in-depth view of the provider facilities.

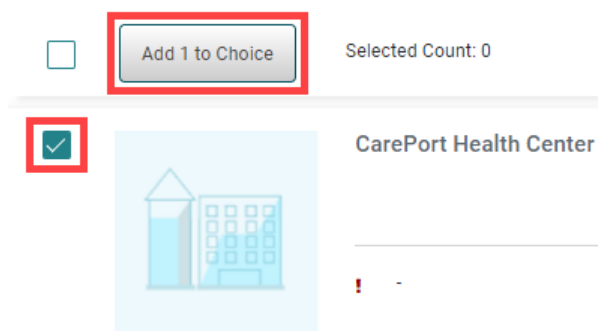
The **Provider Details** window also displays the following tabs:

- **Organizational Levels:** Displays a brief summary of the provider, languages spoken by staff members at this location, and visiting hours information.
- **Level of Care:** Displays available levels of care by this provider.
- **Quality Metrics:** Displays quality metrics for available levels of care by the provider.
- **Amenities:** Displays available amenities by the provider.
- **Insurance:** Displays insurance types accepted by the provider.
- **Services:** Displays a list of services available by the provider.

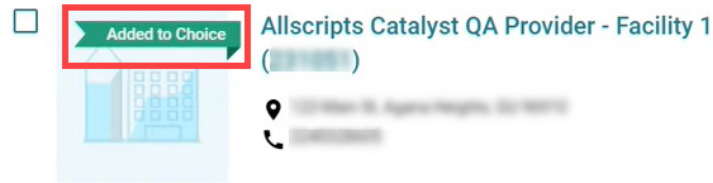
Adding Providers to Patient Choice

After reviewing provider information, you'll be ready to add the relevant providers to patient choice.

- 1) Scroll down through the results, and select one or more relevant providers. Then, click **Add # to Choice**.

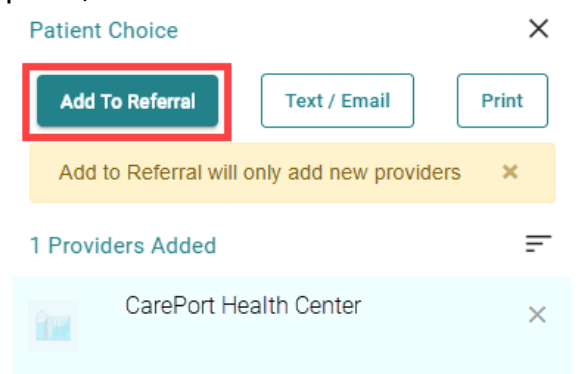


On the **Provider** tab, the added provider icon now displays a **Added to Choice** flag.



Note: **Add to Choice** displays when your referral type has been configured for Patient Choice. If your referral type has not been configured, it will display **Add to Referral** instead. Providers can also be added to multiple choices.

- 2) (Optional) To select *all* listed providers in the results, select the check box next to the **Add # to Choice** button.
- 3) In the **Patient Choice** panel, you have three options to share patient choice:
 - **Add to Referral:** Adds the providers directly to the referral by either bypassing getting patient choice, or bypassing patient choice until you have received responses from the providers.
 - **Text/Email:** Sends email or text messages to the patient, or patient's family member/caregivers to share the choices. Patients and their family members can then review the choices, and rank their preferences.
 - **Print:** Creates printed document to share with the patient/patient's family members/caregivers to share the choices. Patients and their families can review and contact you back give the phone or in person to verbally give their choices.
- 4) In the **Patient Choice** panel, click **Add to Referral**.



A confirmation window displays.

On the **Provider** tab, the added provider icon now displays a **Added to Referral** flag.



Users can review the patient choice at any time from within the referral.

- 5) In the confirmation window, select the patient's role in the provider choice. The following options displays:
 - Patient declines to provide choice
 - Patient is clinically complex
 - Patient is unable to provide choice
 - Patient requested provider
 - Patient returning to provider
- 6) After you have made your selection, click **Select**.
- 7) To notify a patient or family member/caregiver(s) of the selected provider(s), complete the following:
 - a) If you want to share choices to a patient or family member(s) electronically through either email or text message, click **Text / Email**.
 - b) In the recipients field, enter in the phone numbers or email addresses you want to share choices with.
Note: If there are multiple phone numbers and email addresses, they *must* be separated by commas.
 - c) In the **Your Email** address field, confirm that your email address displays.
Note: Upon receipt of this notification, recipients can rank providers.
- 8) In the **Your Name** field, confirm that your name displays.
 - a) (Optional) If it is a part of your user profile, confirm that your phone number displays.
- 9) In the **Add a Message** field, enter any comments or further instructions for the patient or family members/caregivers.
- 10) Click **Share**.
- 11) To share choices to a patient or family member(s) via a printed list of provider(s), click **Print**.

Shared Choice

The **Shared Choice** tab displays the following information about patient information that has been shared:

- **Date of Sharing:** This displays the date the share was created/sent.
- **#Providers:** This displays the number of providers that have been shared.
- **Share method/reason:** This column displays if the patient choice was shared via direct, electronic, or print means.
Note: This column also displays a reason (direct method that was selected) if the organization configured Patient Choice Reasons.
- **Data Shared:** This column displays who the data was shared with, and who responded to it.
- **User:** This displays the user who created the share.
- **View:** This column displays the **View** button that you can click to see either the listed provider(s) selected to be shared that has been ranked by the patient/family member, or a

listed provider(s) selected to share in that you can rank on behalf of the patient/family member(s).

- **Actions:** Select **Actions** to resend or print shared information with the patient or family member(s).

After you have selected provider(s) and added to the referral or shared the choices with a patient or family member(s) and they have ranked their choices, the **Providers** tab displays the following information about the selected providers:

- **Select Checkbox:** This column displays a check box that users can check to select all providers on the page, or to clear all selections.
- **Rank:** This column displays the rank of provider from patient choice, either performed by the patient/family member or a case manager acting on behalf of the patient.
- **Provider:** This column displays the name, phone number, Covid-19 data, and delivery method for the listed provider.
- **Location:** This column displays the address, city, state, and zip code of the provider.
- **Last Sent:** This column displays the date and local time of the last time a referral was sent to the listed provider.
- **Last Response:** This column displays the response of the provider. The options a provider can respond with are the following:
 - Yes
 - No
 - Interested need more information
 - Response Received.
- **Last Message:** This column displays the last comments entered by the provider as they responded on the referral.
- **Actions:** This column displays the **More Options** button which displays the following options:
 - **Message:** Use this feature if you wish to view the message(s) sent on this referral to the provider, or if you need to send a new message to the provider.
 - **Place Referral:** This feature enables users to identify the provider the patient will transition to or the service they will use.
 - **View Referral**
 - **Remove Provider**

Search Filter: The search filter allows a user to type in text they want to find on the page. Uses of this could be typing in a partial name of a provider, or typing in Yes to see all providers who have responded Yes.

 Search Filter

 Summary

Summary Icon: The summary icon, when selected, gives the user information about the referral, how many providers are included on the referral, who and when the referral was created, when and who sent the first referral and who and when the referral was placed, and the name of the provider the referral was placed with.

Sorting Order

The **Provider** tab displays a list of providers in sorting order that changes based on the status of the referral.

Some statuses include:

- **Not Sent Referral**
Providers will display ranked then unranked providers alphabetically.
- **Sent Referral**
Providers will display alphabetically.
- **Provider Responded on the Referral**
 - 1st or top of the list: Providers that respond with a “Yes” will display at the top.
 - 2nd: Providers that respond that they’re “Interested” will display second.
 - 3rd: Providers that have sent a response display third.
 - 4th: Providers that respond with “No” display fourth.
 - 5th or bottom: Providers that have never sent a response display at the bottom of the list.

Note: All provider responses will display in the above order, and will also display alphabetically.

Information

While patient information always displays in the banner at the top of the application screen, more information can be found in the Information tab. The red asterisk that displays next to the information tab will indicate there is a required field on a page that must be completed before the referral can be sent the provider(s).

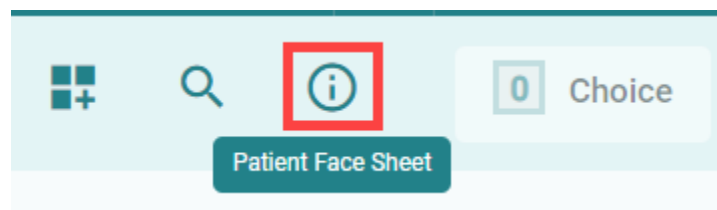
These fields include:

- **Service Address:** This displays if the referral type has been configured to include the Home Care Page. These address fields are important to communicate where homecare will be delivered, because at times it might not be at the actual patient’s home if they are living with a family member during recovery.
- **City:** This displays if the referral type has been configured to include the Home Care Page.
- **State:** This displays if the referral type has been configured to include the Home Care Page.
- **Zip Code:** This displays if the referral type has been configured to include the Home Care Page.
- **Start of Care Date:** This displays if the referral type has been configured to include the Home Care Page. This represents when the organization would like the start of care to being.

- **Projected Discharge Date:** This is a required data field, and is critical to communicate to the provider when the patient is projected to be discharged. A user needs to manually update this field.
- **Primary Diagnosis:** This is a required field, however it is generally populated from the EMR system with the patient's chief complaint.
- **Comments:** This field displays free text notes that can be used to manually document clinical information about the patient that the provider(s) may need to know.

Patient Face Sheet

At any time, users can navigate to the top-right and select **Patient Face Sheet** to view both patient and admission information.



Clinical

Transition includes the following seven clinical categories:

- Clinical Notes
- Diagnostic Reports
- Immunizations
- Lines, Drains, Airways and Wounds
- MAR and Medication Statement
- Procedures
- Vital Signs

Selecting Clinical Documents

Each one of these categories aligns with a specific API in Epic that retrieves clinical data. Clinical information for the patient the displays in the **Clinical** tab in Transition. Depending on the referral type you have selected, different clinical categories will display. For system administrators, please see the **CarePort Transition - Admin Guide - Clinical Configurations** for documentation on configuring the clinical categories and the clinical content by referral type.

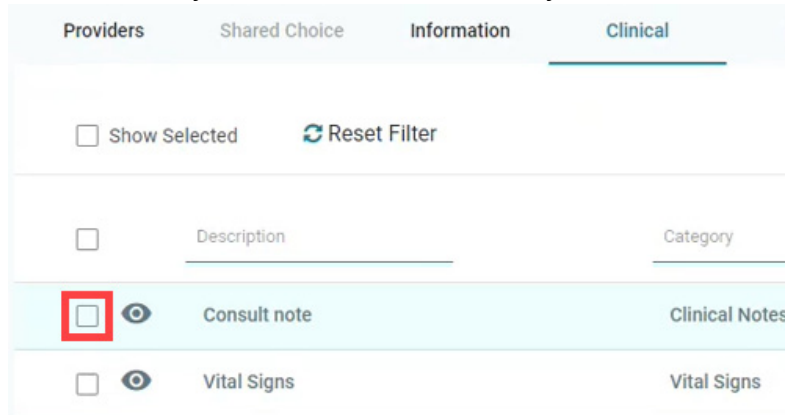
To help narrow down a search, users can select any of the displayed column headers and enter a phrase for searching.



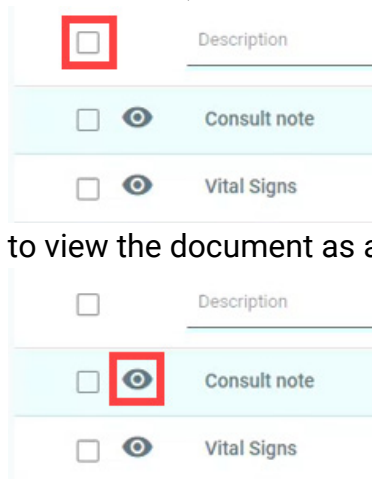
Note: Data only displays in the **Role/Specialty** column for diagnostic reports and clinical reports if they've been received by the API.

To select a clinical document:

- 1) In the **Clinical** tab, select any clinical documentation you want to send with the referral.



- 2) To select all displayed clinical documents, select **All**.



- 3) (Optional) Click **View Details** to view the document as an HTML document.

Selecting Values within Clinical Entries

Some documents may have multiple entries within. For example, if you select a **Vital Signs** document, there may be multiple entries for each vital sign within. Users can select specific entries within a document to attach them to the referral.

To select specific entries:

- 1) Navigate to the relevant clinical document, and click **View Details**. The document displays.
- 2) On the left, select the toggle for each individual entry you want to include in the referral.

Vital Signs Details

	Vital Sign	Result	Date/Time
<input checked="" type="checkbox"/>	BP	120 mm[Hg] / 80 mm[Hg]	08-08-2022
<input checked="" type="checkbox"/>	BP	120 mm[Hg] / 80 mm[Hg]	08-07-2022
<input type="checkbox"/>	BP	120 mm[Hg] / 80 mm[Hg]	07-09-2022
<input checked="" type="checkbox"/>	Weight	65 kg	02-21-2022
<input type="checkbox"/>	Weight	65 kg	01-29-2022

Forms

In the **Forms** tab, you can select or add documentation to the referral.

To select or add a form:

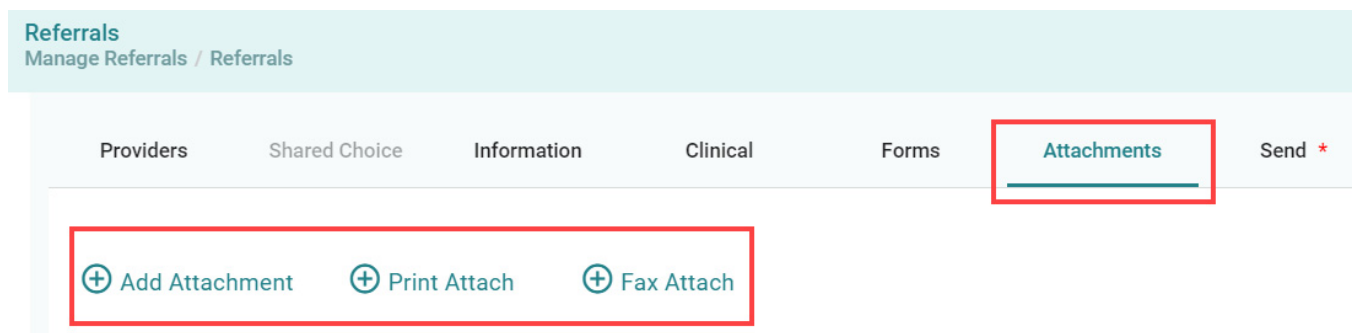
- 1) In the **Forms** tab, navigate to the **Select or Add forms** field, and select the drop-down menu.
- 2) Select the relevant option. The selected form displays.
- 3) Complete the form by entering the relevant information.
- 4) After you've completed the form, navigate to the top of the screen, and click **Apply**.



Attachments

In the **Attachments** tab, users can upload additional documentation by selecting any of the following options:

- Add Attachment
- Print Attach
- Fax Attach



Add Attachments

Users can manually upload relevant documents from their PC to the referral by selecting **Add Attachment**.

To add attachments:

In the **Attachments** tab, select **Add Attachment**.

- 1) On the **Add Attachment** screen, complete the following:
 - a) In the **Drag & Drop** section, either drag the relevant file and drop it onto the section, or select the section and manually locate the relevant file.
 - b) (Optional) In the **Add the description here** field, enter a description for the file.

Click **Add**.

Print Attach

Users can select **Print Attach** to attach clinical documents from an EHR with printing capabilities.

To print attach:

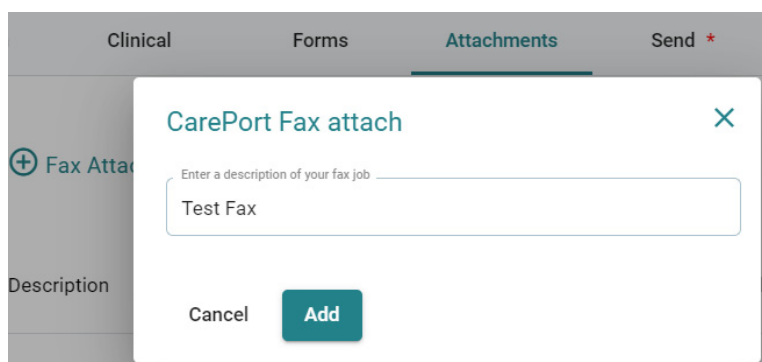
- 1) In the **Attachments** tab, select **Print Attach**. The **User Confirmation** window displays.
- 2) Finish print attaching any relevant documents.
- 3) After you have finished, click **OK**.

Fax Attach

Users can select **Fax Attach** to add a document for faxing.

To fax attach:

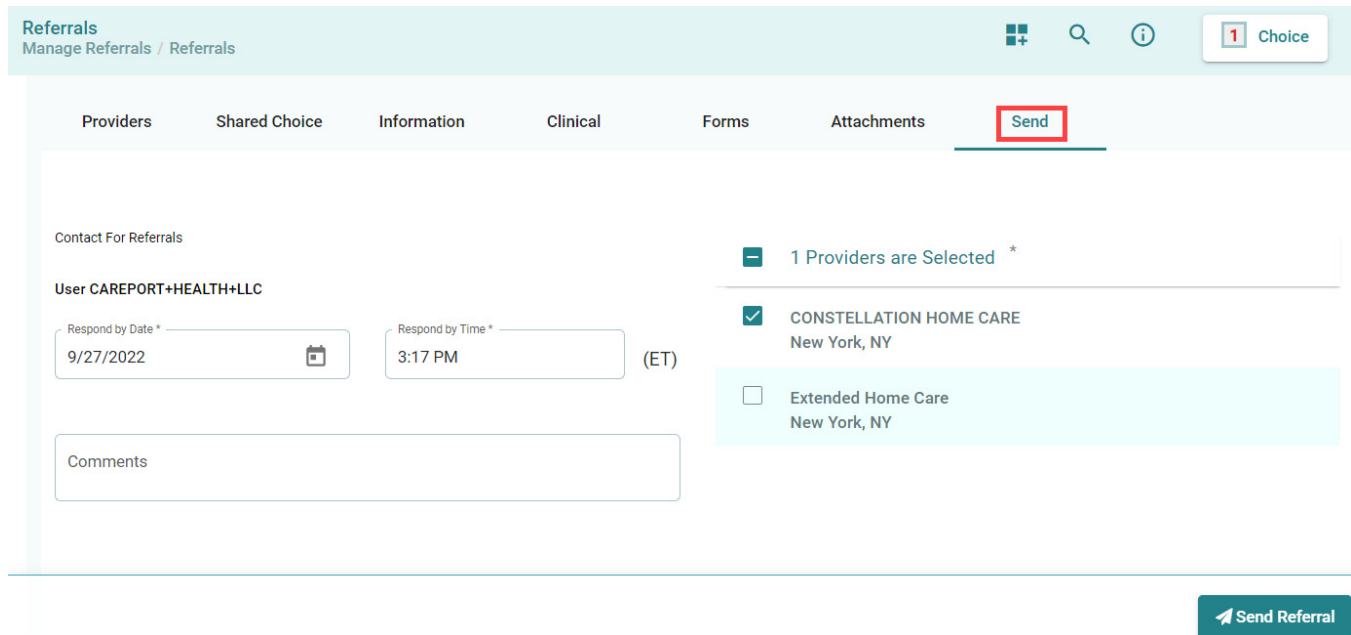
- 1) In the **Attachments** tab, select **Fax Attach**. The **CarePort Fax attach** window displays.



- 2) In the description field, enter a description of your fax job.
- 3) After you have finished, click **Add**.


Send

In the **Send** tab, users can complete the final steps before sending a referral.



To send a referral:

- 1) In the **Respond by Date *** field, select **Calendar** and select the date you want a response to the referral by.

Respond by Date * 

Respond by date is required
- 2) In the **Respond by Time *** field, enter the time you want a response to the referral by. **Note:** You must enter a time in the following format: *HH:MM AM/PM*. For example: 02:30 PM.
- 3) (Optional) In the **Comments** field, enter a comment about the referral. **Tip:** You may want to enter any generic information about the discharge of this referral to the provider(s).
- 4) On the right, select the provider(s) you want to send the referral to.
- 5) Click **Send Referral**.

Referral Statuses

On the **Manage Referrals** screen, the following statuses may display in the bottom-right corner of each referral card:

- **Not Sent:** The referral has been created but not sent to the provider(s).
- **Sent:** The referral has been sent to the provider(s).
- **Placed:** A post-acute provider placement has been documented for the patient indicating which provider will be providing post-acute care.

- **Closed:** Indicates the referral is placed and closed. Referrals are automatically closed two days after the discharge date of the admission.

Patient Choice Statuses

On the Manage Referrals screen, the following statuses may display in the bottom-left corner of each referral card

- **No Choice:** No patient choice exists on the referral.
- **Choice Share:** An electronic or print share exists on the referral.
- **Placed:** The patient/family member or user has responded on behalf of the patient to rank the providers for the patient.

Referral Responses

View a Response

When a response is received from an online provider, the creator, sender, or assigned user of/on the referral will receive an e-mail or text message to the e-mail address and or phone number entered in their Epic User Record.

In Transition, navigate to the **Providers** tab to view referral responses or document a response from an offline recipient. Responses and any additional messages from the recipient display in the **Last Message** column of the **Provider** grid.

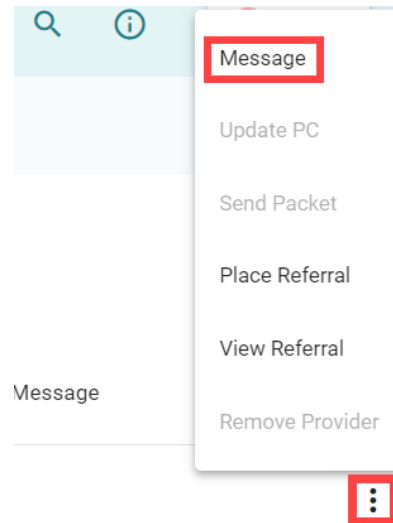
For example:


Last Sent	Last Response	Last Message	Actions
7/28/2022 11:51 AM (ET)	Interested, but need more information	Please send updated clinicals	⋮

Send a Message to a Referral Recipient

To send a message to a referral recipient, complete the following:

- 1) Navigate to the **Providers** tab.
- 2) Navigate to the relevant provider > **Actions** column > **More Options** > **Message**.



- 3) In the **Type messages here** field, enter a message.
- 4) Click  **Send**. The message will save and send.

Edit a Referral

To edit a referral, complete the following:

- 1) Navigate to the **Providers** tab.
- 2) At the bottom of the screen, click **Edit/Send Referral**.
Info: Click **Continue** to navigate through the entire referral or select the tab of a specific page to navigate directly to that page.
- 3) After referral information is updated, navigate to the **Recipients** page.
- 4) Clear the check box next to any providers that should not receive the updated referral information.
- 5) Click **Send Referral**. The updated referral information sends to the selected providers.

Send a Referral to Additional Recipients

To send a referral to additional recipients, complete the following:

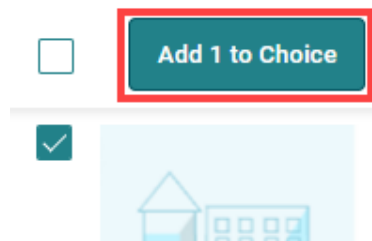
- 1) Navigate to the **Providers** tab.
- 2) At the top of the screen, click **Provider Search**.



Provider search options display.

Note: To exit the provider search and return to the referral, click  **Referrals**

- 3) Use the filters at the top of the page to search for additional recipients.
- 4) Select the additional provider(s), and then click **Add # to Choice**.



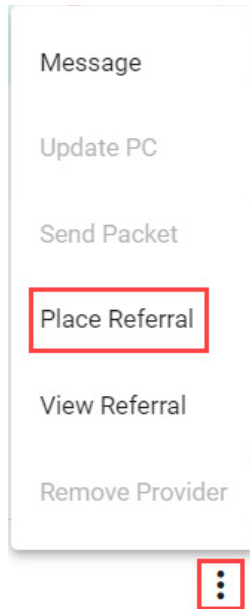
- 5) On the **Patient Choice** screen, click **Text/Email**.
Note: If you want to print or save a list of the selected providers as a .pdf, click **Print**, enter your contact information, then click **Print**.
- 6) On the **Text/Email Details** window, enter the relevant contact information. After you finish, click **Share**.
- 7) On the **Patient Choice** screen, click **Add to Referral**

Placing and Unplacing Referrals




Placing a Referral

To record a placement for the patient, complete the following:

- 1) Navigate to the **Providers** tab.
- 2) Navigate to the relevant listed provider, select **More Options**, and then select **Place Referral**.
The **Place Referral** modal window displays.
- 3) In the **Selected Provider** field, confirm that the relevant provider displays. Select the drop-down menu, then select the provider receiving the placement.
- 4) When the discharge disposition has changed and the patient discharged with a different level of care, record a placement to **None**.
- 5) (Optional) Select **Send placement notification to other providers** to notify other providers of the provider placement choice.
Note: The message to other referral recipients does *not* include information on where the patient was placed.



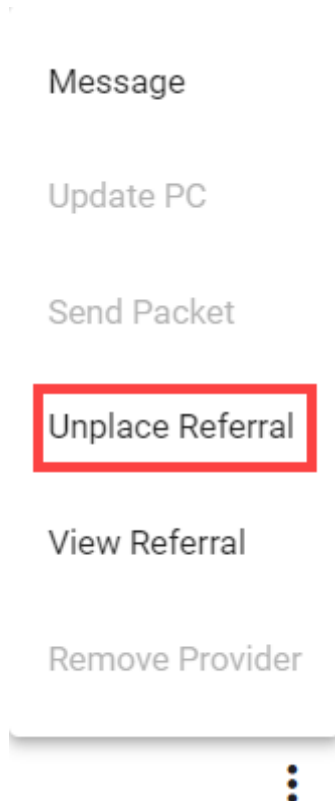
- 6) Click **Place** to add the selected provider as the placed provider. The **Placed** badge displays next to the placed provider name on the **Providers** tab.

	Rank	Provider
		Phone number / Covid Data / Delivery Method
<input type="checkbox"/>		CarePort Home Health  773-632-1676 Offline  Placed

Unplacing a Referral

If the patient situation changes, you can Unplace a referral by completing the following steps:

- 1) Navigate to the **Providers** tab.
- 2) Navigate to the relevant placed referral, select **More Options**, and then select **Unplace Referral**.



The **Unplace Referral** modal window displays.

- 3) Read the confirmation notice. If you would still like to unplace the referral, click **Unplace**.
Note: After the placement has been retracted, users can then resume communication with other providers associated with the referral.

Contact Us

We welcome your feedback. To submit a question, comment, or suggestion regarding product documentation, send an e-mail to documentation@careporthealth.com.

When available, please include as much of the following as possible:

- The name on the document on the title page
- The document ID located in the footer of the document

Please open a ticket with product support at [CarePort Support](#) for product related questions.