Training Guide: CarePort Intake Reporting

Accessing Training Resources

1. Click the ⓘ icon on the Intake application's bottom right. The **Resource Center** displays.

2. Click the **CarePort Intake Reporting** section. A list of **Videos** and **Training Materials** displays.

Intake Reporting Training Materials

CarePort Intake Reporting User Guide: This is a comprehensive guide about CarePort Intake Reporting and is meant to be viewed in electronic PDF format.

CarePort Intake Reporting Overview Guide: This is a high-level overview of each Dashboard and can be printed to reference while watching the videos.

Intake Reporting Dashboard Videos

To learn about the Intake Reporting Dashboards and how to use them, we recommend you watch the videos in the following order:

1. Reporting Introduction

2. Referral Details Dashboard

3. Quarterly Response and Accept Dashboard

4. Decline Analysis Dashboard

5. Referral Trend Dashboard

6. Response Time Delay Analysis Dashboard

7. Intake Summary Dashboard

8. Referral/Decline Analysis Dashboard

9. Trend Analysis Dashboard

Client Support Team

Contact our Client Support team for any questions you have about Intake Reporting.

1. Click the **Settings** ⚙ icon and select **Contact Client Support**.

2. Enter your comment/question/concern and click **SUBMIT**. A **Support Ticket** will be created, and an email will be sent to you.