

# **Written Guidelines for Compression Care Practitioner Portal**

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## How to Send Referrals to Compression Care

1. **Email:** [referrals@compressioncare.com](mailto:referrals@compressioncare.com)

-Our team consistently monitors this inbox for new referrals, questions, return requests, and any other needs you may have. They will get the process started!

2. **Fax:** 615-807-3334

- We know a lot of hospital systems require faxing. For a new referral please fax demographics, insurance cards, signed RX, medical notes with lymphedema diagnosis, plan of care, and the order request (garment type, color,etc). If using email and fax, please kindly specify in your email what we can expect to come through our fax queue!

3. **Online:** [Compression Care](#)

Online is our preferred method! See details below to guide you through signing up.

### Practitioner Portal Signup

1. Click sign up in the top right corner.
2. Complete the details: first name, last name, work email, NPI, and your medical practice.  
\*\*Please do not choose DO NOT USE and please do not skip your NPI. This helps us ensure patients do not sign up in error, as this is a medical professional's platform!  
\*\*Your practice may be in our list if someone else is signed up. If not, please look at screenshot below-you want to click "Can't find your find practice? Add new"

The screenshot shows a form titled "Medical Practice" with a link "Can't find your practice? Add new" to the right. Below the title is a dropdown menu currently displaying "DO NOT USE". At the bottom of the form are two buttons: "Sign Up" (dark green) and "Sign In" (light blue).

If you need to add your practice, please be sure to add the required information. Please be sure to add shipping if it is different from mailing address! Click "shipping same as mailing" if not.

The screenshot shows a form titled "Medical Practice" with a link "Can't find your practice? Add new" to the right. Below the title is a light blue box with the text "Enter your practice details." The form contains several input fields: "Practice Name \*", "Mailing Address \*", "Mailing City \*", "Mailing State \*", "Mailing Zip \*", a radio button for "Shipping same as mailing", "Shipping Address", "Shipping City", "Shipping State", "Shipping Zip", "Phone \*", "Fax", and "Website".

**Once you click Sign Up, our team will manually review the information for accuracy before approving your account. Please be sure to provide accurate NPI and medical practice information to ensure quick verification and portal access!**

## **Medical Professional's Dashboard Guide**

**Dashboard:** In your dashboard tab (top left), you will see your list of patients. This also includes the referral ID, the referral date, patient name, therapist name, clinic name, and status.

**Status:** there are several status types indicating where the referral is in our process. Most common include:

1. **New:** we have not assigned a case manager yet
2. **Assigned:** we have run the benefits verification and assigned a case manager
3. **Abandoned:** anything from “patient in the hospital” to “no longer wanting garments”-not updated and not completed=abandoned  
\*\*Abandoned is not permanent! If the patient touches base with you, the referral can be updated and revived to an active status
4. **Complete:** we have gone through the whole process, patient is happy, we are done!
5. **Other:** you may see signed prescription, garment order details, etc-this indicates a required piece of information is missing and preventing the process from moving towards complete

### **Message Icons:**



1. **Cloud:** upload missing documents (choose type in drop-down; add desired notes)  
\*Notes are instantly added to the patient chart and your upload triggers an email update to the case manager
2. **Eye:** This shows you the order details. Please keep in mind the price shown does not necessarily indicate what the patient will pay, as this is a *cash* sale price. You can place exact reorders through this-but only exact (item, color, size, quantity, etc).
3. **List/Three Lines:** patient order history (with us). Allows you to know what they've tried, could help you with what they liked or didn't like, remind you they have fluctuating edema if they've ordered a few sizes in short period of time, etc.
4. **Message box:** A red flag indicated an unread message. Click on this, and notice these are date and timestamped-comments are added for this referral and ordered oldest to newest to ensure you read through all of them. When you add a message and hit submit, it will date and timestamp your message while adding a note to the patient chart, and send an email alert to the case manager.

## **Medical Professional's Dashboard Guide (Continued)**

**Other Tabs:** Below the dashboard tab, you'll see other tabs including:

Clinic Referral View: Must be requested and approved by COO, Joshua Perkins. Request meeting by clicking [Q&A with Joshua](#)

Guided Referral: insurance referral-can see existing patients or create new. Instructions on page 3.

Express Referral: Must be requested and approved by COO, Joshua Perkins. Request meeting by clicking [Q&A with Joshua](#)

Abandoned Referrals: archived pending referrals. Hit "resume" to complete the referral as needed.

Self-Pay Order: when patients do not have coverage for their order. Instructions on page

General Questions: guidance on common questions

Forms: check out useful referral forms, measuring guidelines, and major manufacturer order forms

## **Guided Referral Instructions**

1. Locate guided referral tab in the list on left side of the screen and click  
-Here, you see patients you've had. If you're creating a referral for an existing patient, you can select them here.
2. For a new referral, hit new patient.
3. **Step 1: Patient information.** Be sure to complete all data-name, DOB, patient's email, phone number, gender. Then hit next.
4. **Step 2: Face sheet.** Choose upload now, request from my office, or I'll submit later via portal, fax or email  
*\*Uploading now provides quickest turnaround!*
5. **Step 3: Health Insurance Information.** Choose upload cards now, request from patient, request from my office, it's already on the face sheet, or submit later.  
*\*Uploading now or it's already on the face sheet will provide fastest turnaround!*
6. **Step 4, part 1: Plan of Care.** Choose upload now, please request from my office, or submit later.  
*\*Uploading now will provide fastest turnaround!*
7. **Step 4, part 2: Would you like to provide any custom measurements:**  
If yes: choose to upload now, submit later, have us request from your office, indicate when already in the plan of care or when you submitted through manufacturer portal (manufacturer portal will require details of the portal ID)
8. **Step 5, part 1: Can you provide a prescription?**  
-choose upload now, request from my office, request from referring physician, or submit later  
*\*Uploading now is the fastest turnaround*

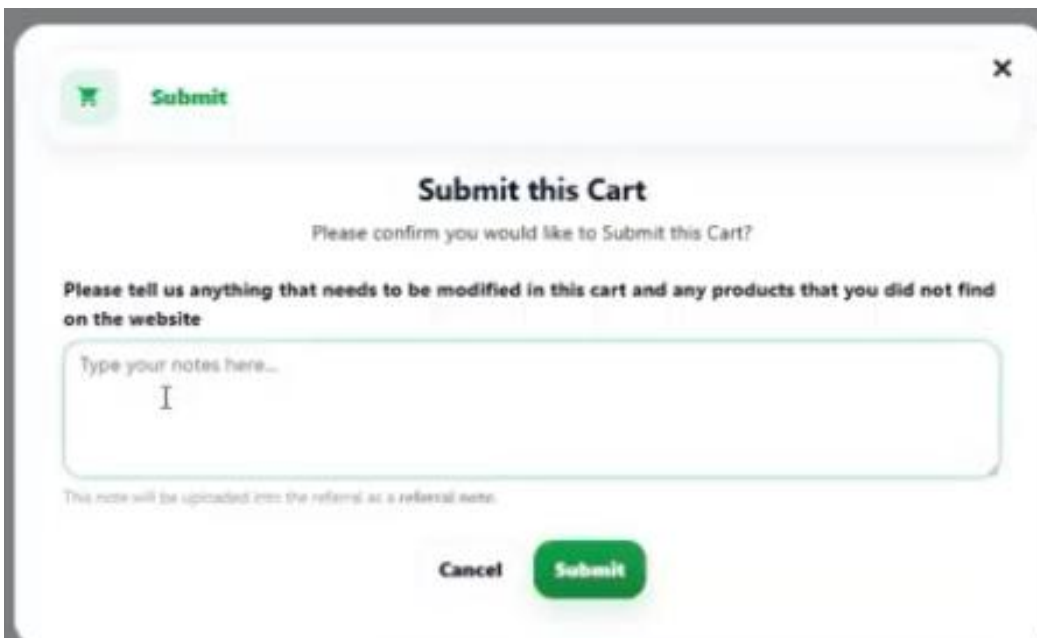
***-Please be advised that Medicare now requires a signed prescription AND medical record notes that state lymphedema diagnosis.***

## Guided Referral Instructions (Continued)

### 9. Step 5, part 2: You have two **submit options**:

1. Submit patient and build a garment plan for me: choosing this indicates we should look at paperwork you submitted and choose the garments you already indicated (i.e. if you uploaded custom measurements, its in plan of care, etc).

2. I want to select garments for my patient now: this brings you to a page that lets you choose ready-to-wear garments for your patient. Once cart is loaded with what you want, click submit. A popup window will appear and you can add any notes needed-these will immediately upload to the patient's chart. Hit submit again and you are done!



The image shows a confirmation popup window titled "Submit this Cart". At the top left, there is a green shopping cart icon and the word "Submit". At the top right, there is a close button (X). The main heading is "Submit this Cart", followed by the question "Please confirm you would like to Submit this Cart?". Below this, it asks "Please tell us anything that needs to be modified in this cart and any products that you did not find on the website". There is a large text input field with the placeholder text "Type your notes here..." and a cursor. Below the input field, a small note states "This note will be uploaded into the referral as a referral note." At the bottom, there are two buttons: "Cancel" and "Submit".

### Additional Information

**De-Duping System:** When you submit a patient referral, we check the system thoroughly to avoid duplicates in the system. We merge necessary info so patients exist only under the correct, most current therapist. Once the referral goes through the de-dupe process, it will show on your dashboard. Do not panic if you don't immediately see the patient on your dashboard!

## Self-Pay Order Instructions

If patient knows they won't make the deductible, already used coverage, or does not have coverage, you can submit a self-pay referral.

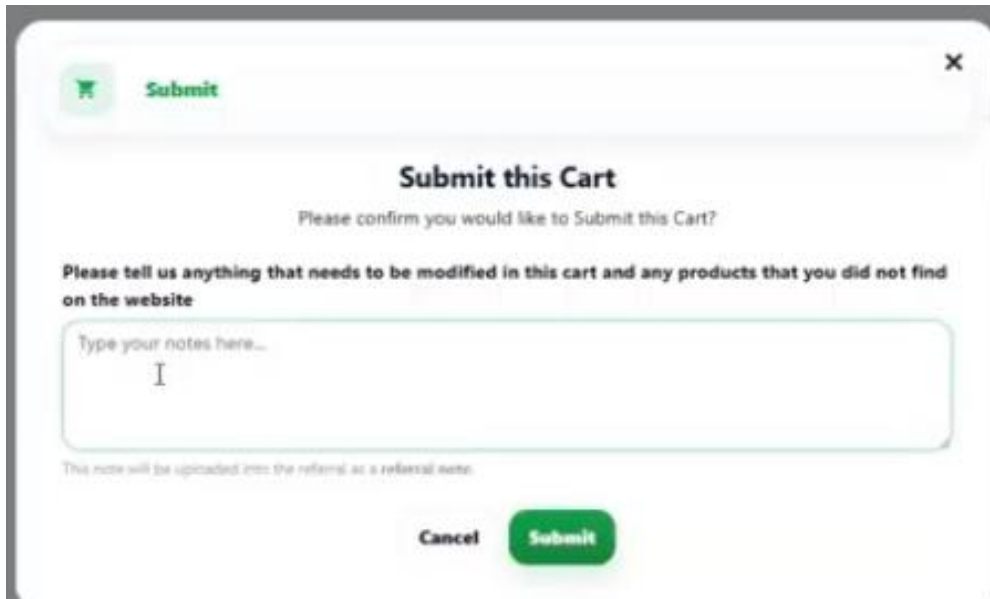
1. Add new patient: must include patient information as requested on the page  
\*Please be sure address is most up-to-date for shipping preference!
2. Choose yes or no for "Would you like to provide custom measurements?"

**If YES:** Choose from the following:

- Upload custom measurements now
- Please request from my office
- I'll submit later via portal, fax, or email
- It's already in the plan of care
- Submitted through manufacturer portal

**If NO:** hit submit-this brings you to the shop site.

3. Choosing Ready-to-wear products: search and add your preferred products to your cart for the patient. Be sure you select the appropriate size, length, color, compression level, and quantity as needed.
4. Once cart is loaded with what you want, click submit. A popup window will appear and you can add any notes needed-these will immediately upload to the patient's chart. Hit submit again and you are done!



Submit

### Submit this Cart

Please confirm you would like to Submit this Cart?

Please tell us anything that needs to be modified in this cart and any products that you did not find on the website

Type your notes here...

This note will be uploaded into the referral as a referral note.

Cancel Submit