

Written Guidelines for Compression Care Practitioner Portal

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How to Send Referrals to Compression Care

1. Email: 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 practice? Add new"

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

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 form is titled "Medical Practice" with a link "Can't find your practice? Add new" in teal. It contains several input fields: "Enter your practice details." (teal box), "Practice Name *", "Mailing Address *", "Mailing City *", "Mailing State *", "Mailing Zip *", a checkbox 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, reminds 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 dates 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 submit, it will date and time-stamp 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

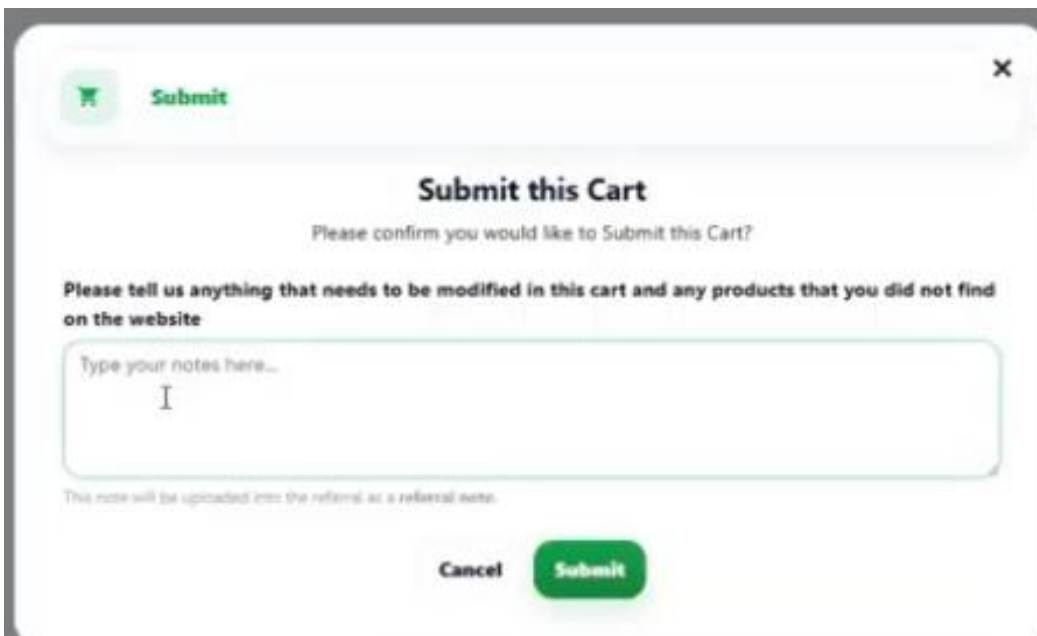
1. Locate guided referral tab in the list on left side of the screen and click
-Here, you see patients you've had. If you're creating a referral for an existing patient, you can select them here.
2. For a new referral, hit new patient.
3. **Step 1: Patient information.** Be sure to complete all data-name, 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, it's 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 screenshot of a web application's 'Submit this Cart' popup window. The window has a white background with a light gray border. At the top left, there is a green shopping cart icon and the word 'Submit' in green. At the top right, there is a close button (X). The main heading is 'Submit this Cart' in bold black text. Below it, a subtitle asks 'Please confirm you would like to Submit this Cart?'. A prompt follows: 'Please tell us anything that needs to be modified in this cart and any products that you did not find on the website'. Below this is a large text input field with the placeholder text 'Type your notes here...' and a cursor. At the bottom left of the input field, there is a small note: 'This note will be uploaded into the referral as a referral note.' At the bottom of the window, there are two buttons: 'Cancel' in black text and 'Submit' in white text on a green rounded rectangle.

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.

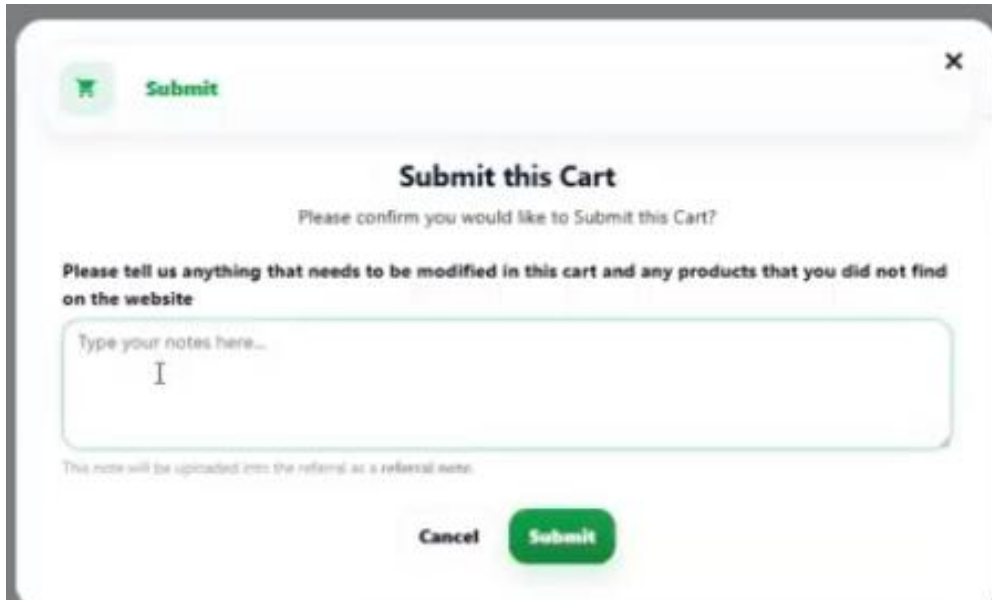
1. Add new patient: must include patient information as requested on the page
*Please be sure address is up to date for shipping preference!
2. Choose yes or no for "Would you like to provide custom measurements?"

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 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

Detailed Status Explanations

1. New: In our system, not yet processed · Should only stay here for 2 days.
2. Assigned: The insurance benefits have been verified, and those benefits have been sent via email to the therapist and patient. At this status, the patient referral is awaiting a Case Manager review for any missing items or to order.
3. Benefits: This is a holding pattern, meaning the benefits have been verified, and a CM is reviewing the file.
4. Coinsurance: This status is a lot like payment status. We are waiting for the patient to pay. At this status, the information has been emailed to the practitioner and the patient, and an invoice has been sent to the patient.
5. Garment Order Details or Garment Information: We need the Practitioner to send specifics for the garment.
6. Missing Information: We are missing something specific from the Therapist. The specifics will be emailed to you and also available in the messages section of the portal.
7. Payment: We are waiting for the patient to pay. At this status, the information has been emailed to the practitioner and the patient, and an invoice has been sent to the patient.
8. Signed Prescription: We are missing the prescription. At this status, we have already sent the prescription and medical records request to the physician or have requested the physician's information from the practitioner.
9. Signature on Form: The patient needs to sign a form. At this status, the form has been sent to the patient, and the practitioner has been emailed.
10. Waiting on Doctor's Notes: This status means we have most likely received the prescription but do not have a signed physician's office note with a lymphedema diagnosis.
11. Referred (company name): This is part of our Care-Coordination network, and another company is handling the referral as a service to the patient.

Detailed Status Explanations (Continued)

12. Ordered: Garment order has been placed with the manufacturer.
13. Shipped/Partially Shipped: The manufacturer has let us know the product has shipped.
14. Delivered/Partially Delivered: The shipping company has let us know the product has been delivered.
15. 1st/ 2nd Follow Up: Garment was received by the patient, and we sent a satisfaction survey.
16. Follow Up/Fit: We have ordered 1 for fit and are following up to order the additional garments. This might include a message to Practitioner to confirm fit.
17. Exchange/Remake/Return: This status means the patient or practitioner has reported an issue with the fit of the garment, and we are working on replacing the garment. Information regarding the return/exchange will be emailed to the patient and practitioner and can also be found in the messages section of the portal.
18. Complete: Every Step is done, and this referral is closed.
19. Abandoned/Archived: The patient or Therapist decided not to proceed or did not communicate back to us in a reasonable timeframe. We can always pull a patient out of this status and start the process back up