Cortex Customer Handbook

Last updated Aug 13, 2025

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Cortex Overview

Cortex is a software platform with services driven to assist post-acute providers in their mission to care for patients. Founded in 2015 by Riley Adamson, we were initially known for making follow-up calls to patients after discharge from the hospital. Since that time, Cortex has become a full-featured software platform for post-acute providers, sitting alongside the EHR to generate opportunities for positive healthcare outcomes. Excellent clinical outcomes, patient experience scores, and employee retention rates must exist as a modern post-acute provider. Cortex enables post-acute providers to impress network partners with these improved outcomes and identifies past patients with new care needs.

Cortex has different products that provide multiple services. Each of them is described in detail throughout this handbook and summarized below:

- **CheckUp Calls** - Cortex Registered Nurses conduct follow-up phone calls to gather clinical and satisfaction feedback directly from patients and family members. The Cortex Platform records every phone call and provides rich logs and analytics for operation staff in real time.

- **Resident Surveys** - Cortex provides a software application that staff can use to gather feedback from residents currently in operation.

- **Employee Surveys** - Cortex can conduct electronic surveys by text and email to gather regular feedback from new hires, existing staff, and former employees.

- **Hospital Alerts** - Cortex notifies your staff in real-time when a current or former patient goes to the hospital, including inpatient admissions and discharges, as well as emergency department visits, for all hospitals in your market.

- **Transition Manager** - Easily send and receive electronic referrals, and track referral outcomes.

During implementation and throughout your experience with Cortex, if you have any questions or need additional help, please contact us at success@cortexhc.com.

Getting Started

Welcome to Cortex! To receive a Cortex login, please have your administrator contact us (success@cortexhc.com) so we can set one up for you!

If you would like a training session at any time, please reach out to us, and we can set one up.

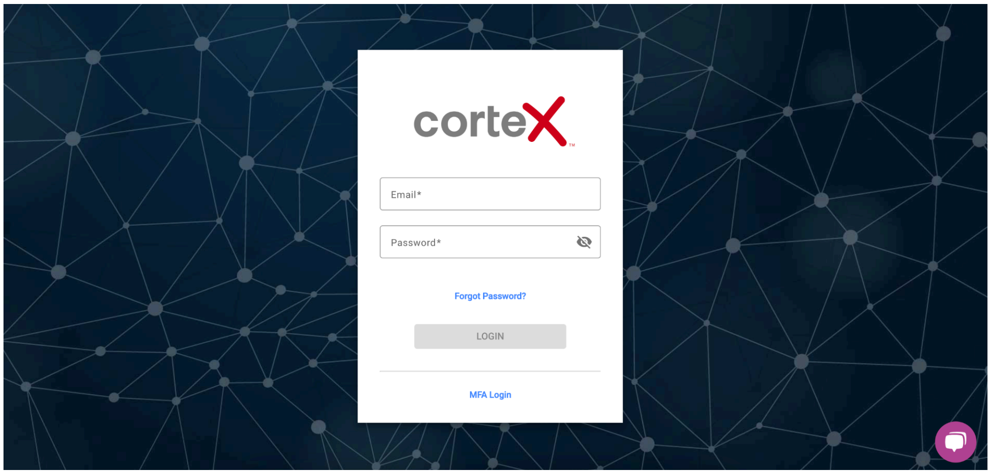
Roles and Permissions

- **Patient Admin**: Can view patient data, including CheckUp Calls, Resident Surveys, Hospital Alerts, Patient Profiles, and Transitions. Admins can also leave notes on patient records throughout the system.
- **Contract Signer**: This role can view who has access to Cortex for a specific entity and remove users that should no longer have access. Contract Signers may request access for new users at their assigned operation(s).
- **Patient Champion**: Designated person(s) who review Cortex regularly to review and respond to patient survey responses.
- **HR User**: Can view Employee Surveys, both anonymous and named surveys.

- **Gift Card Sender**: Can send Gift Cards to employees via Cortex.

Logging In

- Open your Google Chrome[1] web browser or your Cortex App.
- Navigate to https://portal.cortexhc.com and enter your credentials in the appropriate boxes. The Cortex Success Team should have sent this link and your credentials to you via email[2].
- The login page looks like this:



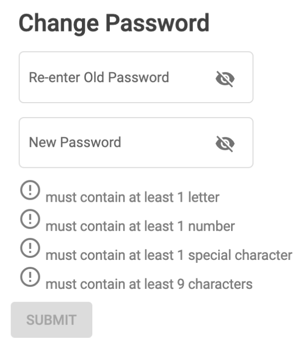
Changing your password

Changing a password is a simple process outlined below:

- Click your name in the upper right corner.

- Select 'My Account' and scroll down to the 'Change Password' section and enter the needed information:

[1] The Cortex platform works best on Google Chrome.
[2] If you do not receive an email, please contact your administrator or email success@cortexhc.com

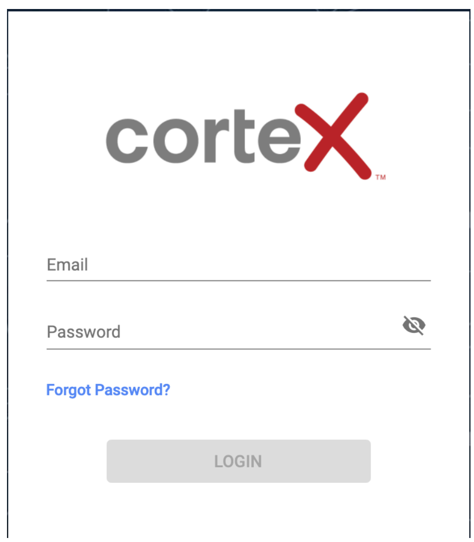


- Click 'Submit' to save your changes.

Forgot Password

If you happen to forget your password, you may reset it by following these steps:

- On the Cortex login screen, click 'Forgot Password?". (https://portal.cortexhc.com)

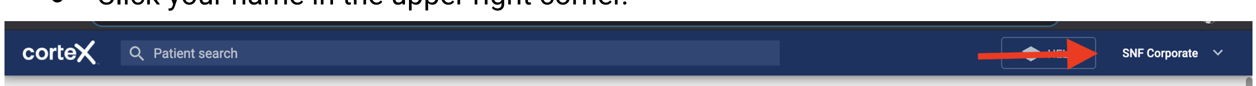


- Enter your email and submit to receive instructions on how to set a new password.

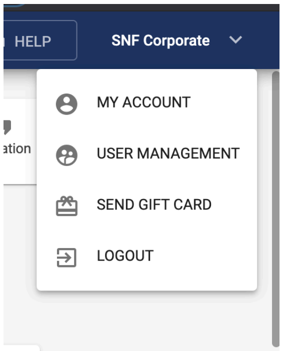
Notification Preferences

You can set up reports and alerts to receive notifications under your account profile's notification preferences section.

- Click your name in the upper right corner.



- Select 'My Account,' which will bring you to a new page. This page includes 'Profile Information,' 'Change Password,' and 'Notification Preferences.' Scroll down to the notification Preferences section, and you can check or uncheck alert boxes as needed.



- Click 'Submit' to save your changes.

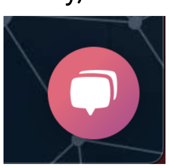
Notification Best Practices

Most Cortex customers tasked with reviewing patient surveys do not subscribe to alerts regarding every completed call and resident tablet survey. Instead, they subscribe to opportunities that are relevant to their role. See the Opportunities section below for more details on the different opportunity types Cortex supports.

Troubleshooting and Support

We're here to help! Our Customer Success team is eager to walk you through how to access your Cortex products and services and maximize the value added to your role and operation. Here is how you can get ahold of us:

- Chat with our support team using this icon at the bottom right of the screen, Monday - Friday, 8 am- 5 pm MST.



- Call our support team at +1 833-568-6288, Monday - Friday, 9 am-5 pm MST.
- Email success@cortexhc.com any time; if outside our regular hours, we will help you first thing the next business day.

Self-Support

If you experience an additional technical issue, such as a page not loading, longer-than-expected load times, a link not working, or any other concern, we suggest trying the following:

- Verify you are in Google Chrome (often opening links from email will open a different browser than you intend)
- Go to this URL directly (rather than clicking on a link): http://portal.cortexhc.com/login.
- Make sure Google Chrome is up to date (check for any updates)
- Refresh the page (CTRL + R)
- Hard refresh (CTRL + Shift + R)
- Restart your computer
- Clear your cookies and cache cache
    1. On your computer, open Chrome
    2. At the top right, click the three-dot menu.
    3. Click "More tools" -> "Clear browsing data"
    4. At the top, choose a time range or select "All time."
    5. Check the boxes next to "Cookies and other site data" and "Cached images and files."
    6. Click "Clear data."

If none of that helps resolve your issue, please contact our customer support by clicking on the chat icon in the lower right corner of the screen or emailing success@cortexhc.com.

Mobile App

Cortex also has a free mobile app that is available for Android and iOS users designed for providers on the go to review patient calls and hospital alerts in real time. Search "Cortex Health" in your app store to download and log in.

Download on the App Store

Google Play

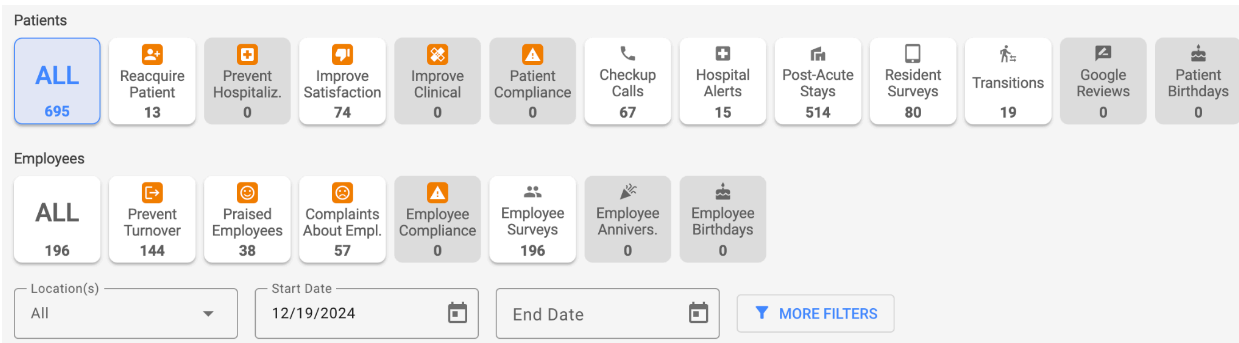
Knowledge Base

Cortex has an extensive Knowledge Base where you can find tons of helpful information about the Cortex platform as well as release notes and recordings of our monthly webinars. You can access this clicking on the “Learn” button in the upper right hand corner of your screen.

General Tips and Tricks

Here are some additional tips, tricks, and best practices to help you get the most out of Cortex products and services:

Filters



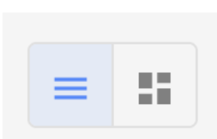
Each Cortex product home page and report will have a set of filters relevant to the data within that product. If you ever find any data missing, check the filters to ensure they are correct for what you want.

Filters are beneficial when you check data for multiple facilities within your network, as you can filter by a specific operation. You can also filter by date, outcome type, viewed/unviewed, and more.

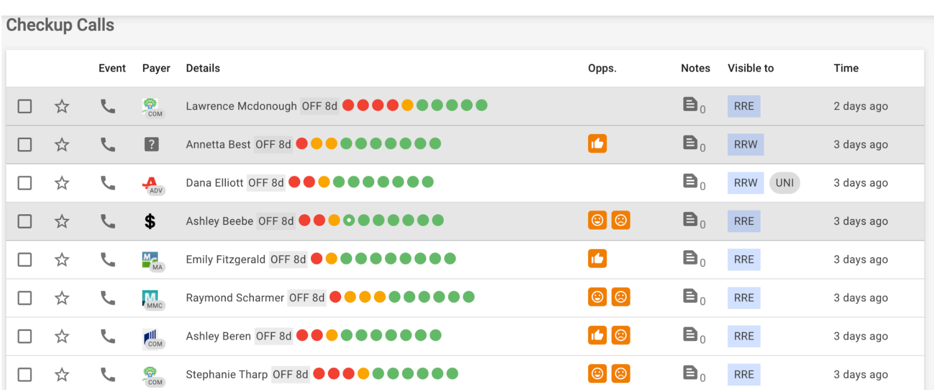
List View vs Card View

There are two ways that you can view information in the Cortex platform depending on your preferences. To switch between "list view" and "card view" you will need to select your preference in the bottom left hand corner of the screen.

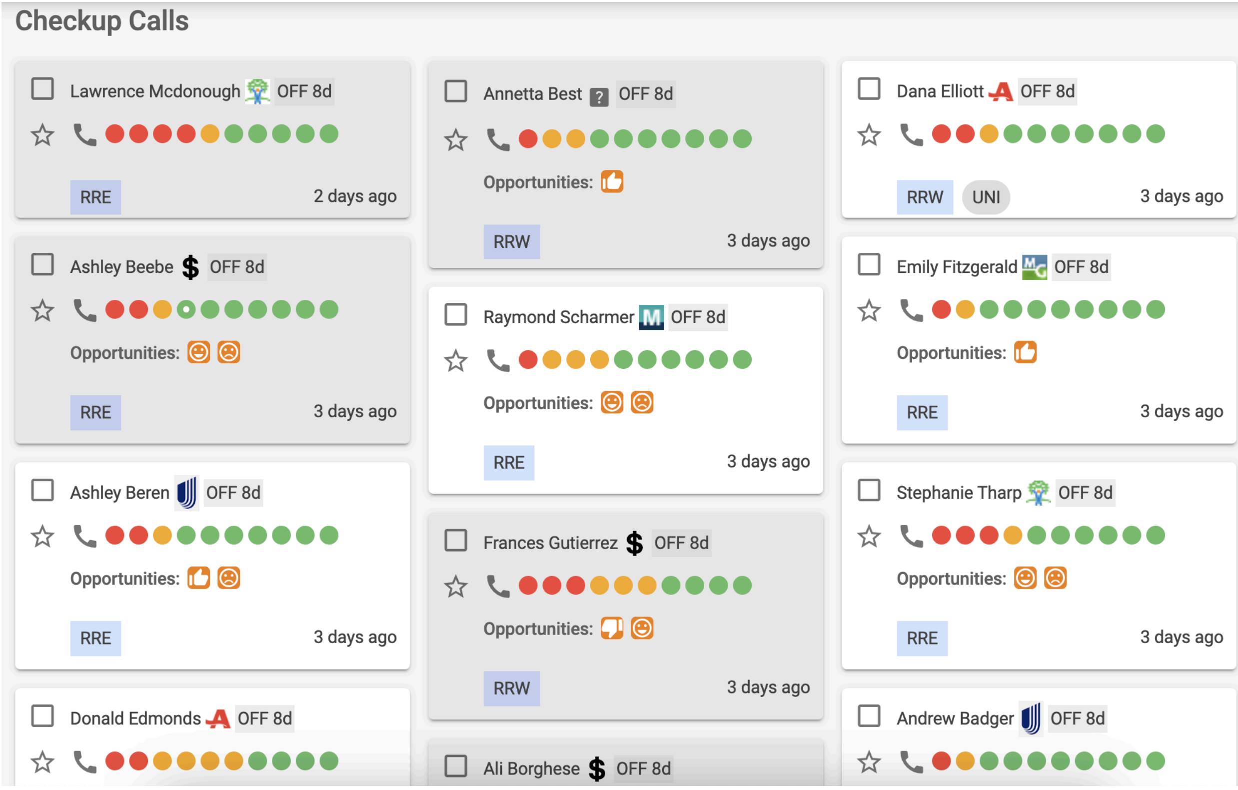
The button looks like this:



List view will present patient and employee information like this:



Card view will present patient and employee information like this:



Patient Records

Cortex uses data from your electronic medical records or EMR to know when patients are admitted and discharged. The Cortex Platform uses EMR data to automatically schedule follow-up calls to your patients and provide the appropriate alerts for you and your team.

It is up to you to ensure the data is as accurate as possible. Here are some tips to keep your data up to date:

- Make sure your patient records have good phone numbers.
- Mark any patients who have passed away as deceased in your EMR. As a redundancy, you may also deactivate their call schedules in Cortex.
- Make sure admit and discharge dates are present and accurate.

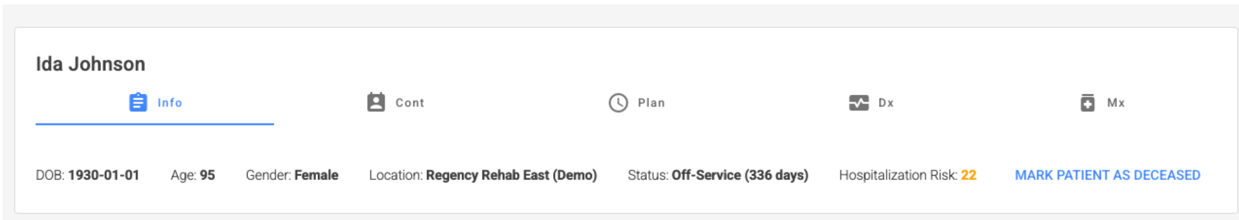
Deactivating a Patient

Sometimes there are patients that you don't want to be called by Cortex. A few examples of patients you may not want to call are a patient who left AMA from your operation, or you found out your patient is under hospice care, or this is a furious and upset patient, and you know a call to them would just make them more upset.

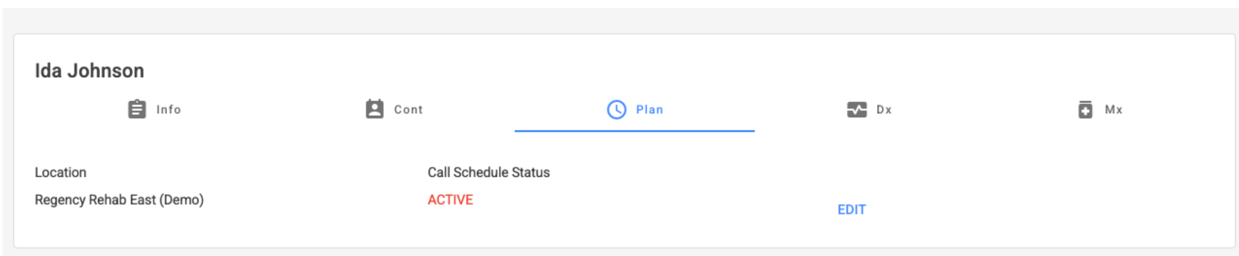
Here is how to deactivate a patient:

1. Along the top of the page, search for a patient in Cortex and click on their name.

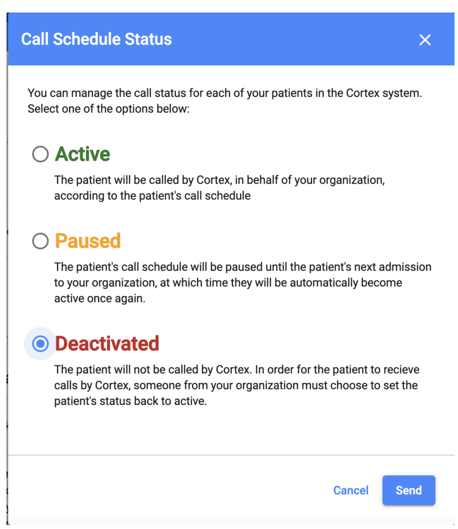
2. Once you click on the patient's name, that will bring you to the patient's profile.



3. Scroll down until you see the box titled "Plan."



4. Click “EDIT” in the lower right-hand corner and change the call schedule from "Active" to "Paused" (this will pause all calls until the patient's subsequent admission to your organization) or "Deactivated (patient will never be called by Cortex again) and click "Send" to save.

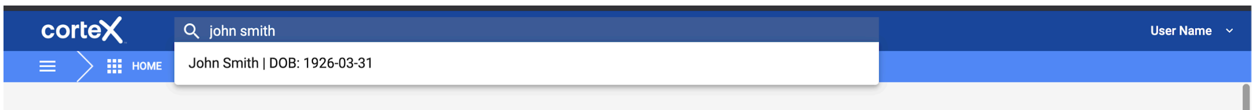


Marking a Patient as Deceased

The best way to avoid having Cortex call deceased patients is to mark patients as Deceased within the platform. Usually, this data will come from your EMR, but this data fails to sync in some cases.

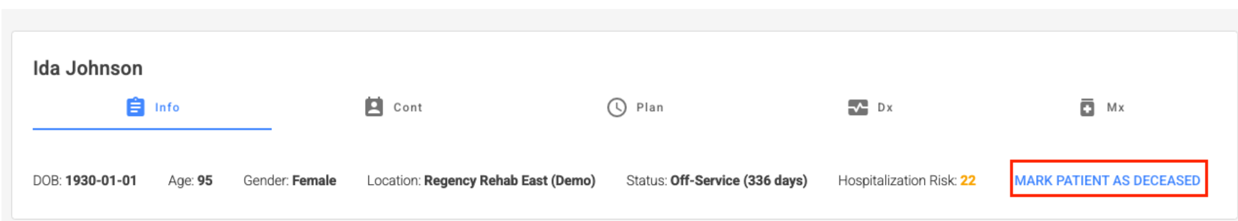
Here is how to mark a patient as deceased manually:

1. Along the top of the page, search for a patient in Cortex and click on their name.



2. Once you click on the patient's name, that will bring you to the patient's profile.

3. Look for the 'mark patient as deceased' text below the patient's name and birth date and click it.



4. This will mark the patient as deceased. If you incorrectly check someone as deceased, please contact Cortex via the chat function or email us at success@cortexhc.com, and we will correct the error.

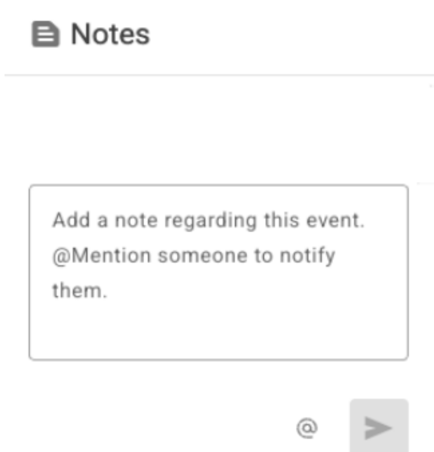
Inaccurate Information

At some point, you may find inaccurate information in Cortex, including an incorrect discharge date or date of birth. Please let us know if this happens so we can investigate and resolve the issue! You can report this to Cortex by using the chat feature on our website or emailing us details of the information to success@cortexhc.com. To avoid sending patient health information over insecure channels, sometimes it can be easier to copy the link to the page where you see the error instead of using patient names. Our URLs are unique and allow our support team to view what you're seeing.

Leaving a Note

At some point, you might need to leave a comment on a patient profile, call, or hospital alert. You will likely leave a comment noting what you did to follow up with that patient regarding a particular event or concern. To leave a note:

- Find the Notes section on the right-hand side of the screen
- Type your message in the message box
  - If you would like to alert a specific team member to your comment, use the @ symbol and then type or find their name
- Click "send" to save your message.



Opportunities

Opportunities summarize fundamental discoveries and alert specific team members about important information from all Cortex products. Opportunities enable you to maximize the value you get from Cortex without requiring you to review *every* survey.

Different team members may be responsible for various Opportunities based on his/her role. Each user may configure alerts and notifications accordingly in the preferences.

Opportunity Types

Patient

1. **Reacquire Patient** - A former patient has had a recent event that indicates they may be eligible for additional care
2. **Prevent Hospitalization** - A current or former patient has had a recent event that indicates this patient is at high risk for readmission to the hospital
3. **Improve Satisfaction** - A current or former patient is experiencing a satisfaction issue
4. **Improve Clinical -** A current or former patient is experiencing a health issue or concern with

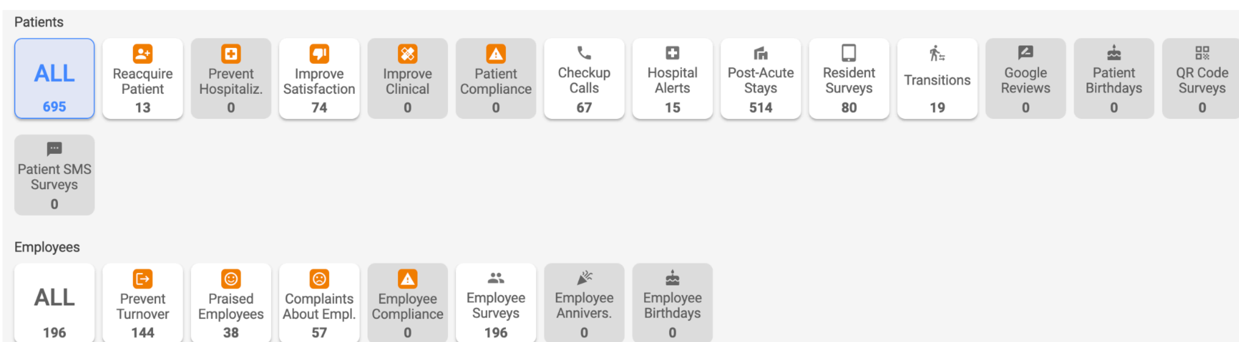
the clinical care they received
5. **Patient Compliance -** Please email success@cortexhc.com for more information about patient compliance alerts

Employee

6. **Prevent Turnover** - A current employee has expressed the need for additional support or is dissatisfied regarding their employment
7. **Praised Employees** - A current or former patient has given praise to a specific employee on your team
8. **Complaints About Employee** - A current or former patient has complained about a specific employee on your team
9. **Employee Compliance -** Please email success@cortexhc.com for more information about employee compliance alerts

Clicking on a specific Opportunity type will reveal details for that specific opportunity type and provide recommended follow-up actions for your team to capitalize on the discovery.

Remember that you may not see every Opportunity mentioned above in your Cortex platform as Opportunities are product and survey-question-specific.

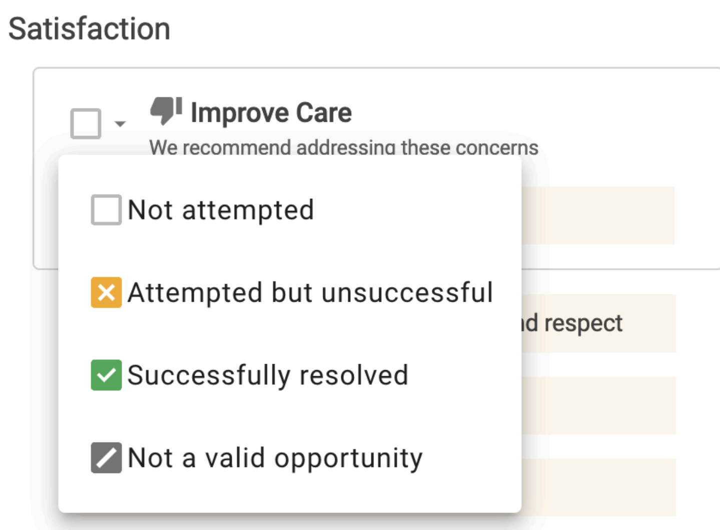


How to Mark an Opportunity as Complete

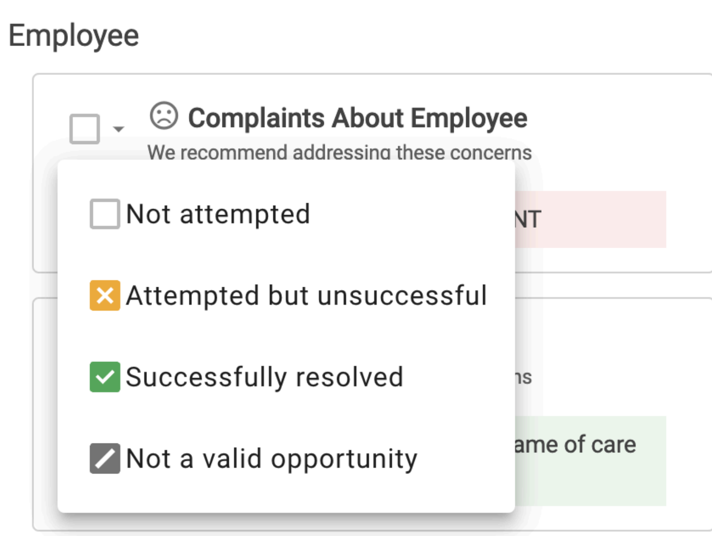
Once you have identified an Opportunity in the Shared Inbox, open the patient or employee profile to learn more information about the Opportunity.

It is important to update the status of each Opportunity. You can do so by clicking the check box next to the Opportunity type in the patient profile and selecting the correct outcome.

Patient Opportunity Example:



Employee Opportunity Example:

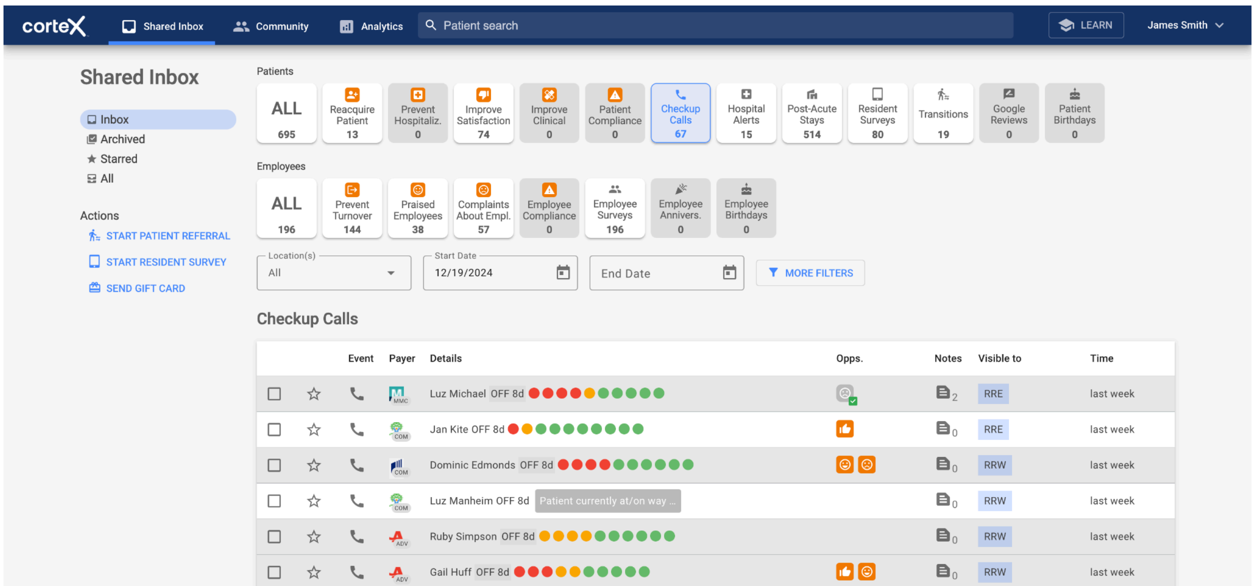


CheckUp Calls

Cortex Registered Nurses will conduct follow-up phone calls to your patients and family members. If you'd like to see the questions we're using on our survey, go to Reports -> Call Schedule Manager.

Shared Inbox

When you log in to the platform, select “Checkup Calls” from the list of filters in the “Patients” column. You will notice a list view of completed and attempted calls. You can filter the list further by date range, payer type, outcome, etc., by selecting “more filters.”



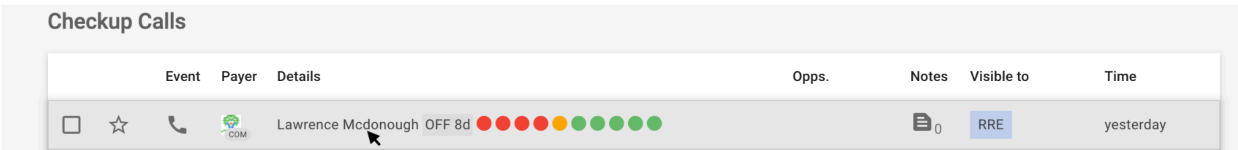
From the list, you will notice column headers: patient name, insurance, visible to (a coded version of your organization name), on/off service (number of days), opportunities generated from the call, the time when the phone call was made, and call responses.

Under the Call Response column, you will notice red, yellow, and green bubbles. These bubbles indicate how your patient or family member answered each question our RN asked on the call. These response bubbles can help you quickly identify good vs. poor responses. Here is a key to the colors:

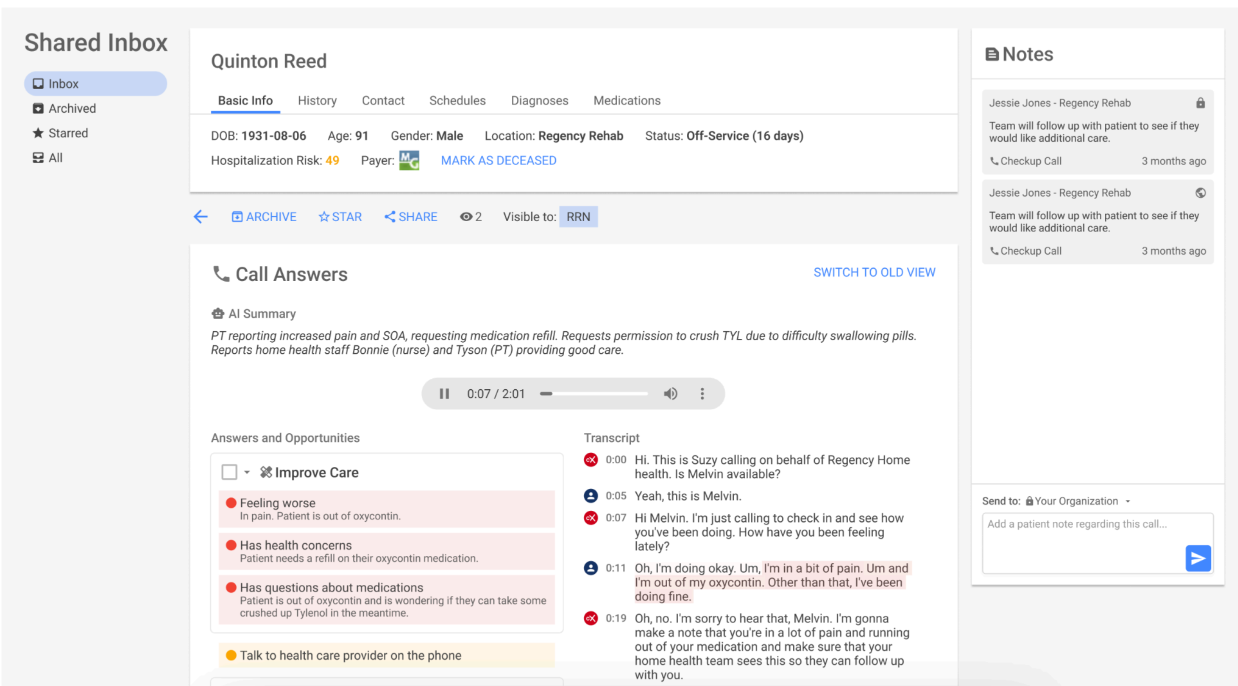
- Green: Good
- Yellow: Fair
- Red: Poor

Reviewing A Call

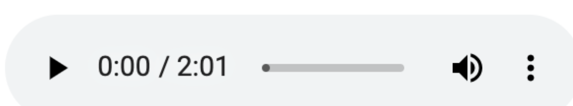
You can click on the patient's name to open the patient profile and view more information about the call.



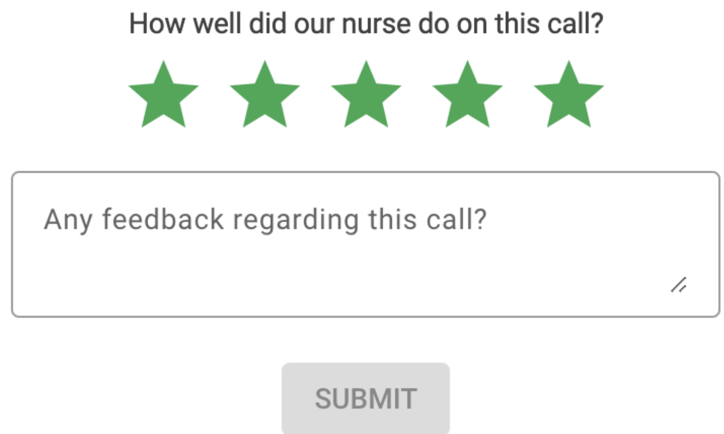
Users will find A more detailed summary of the call here. You can review feedback regarding Health Status (clinical questions), Satisfaction feedback, Employee feedback, and any other information that our nurse gathered for you that could be helpful.



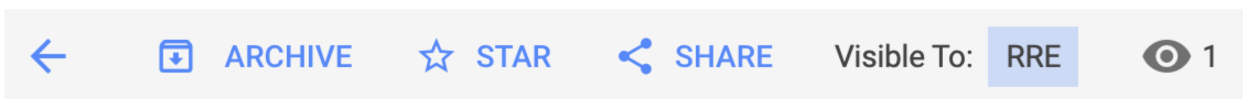
We will provide a complete audio recording of each call and an option to request a conversation transcript.



Additionally, we ask that you rate our RN who made the call by providing a 1-5 star rating and including some feedback along with your rating. Ratings are optional, but your feedback helps Cortex conduct quality assurance and ensure your services continually improve.



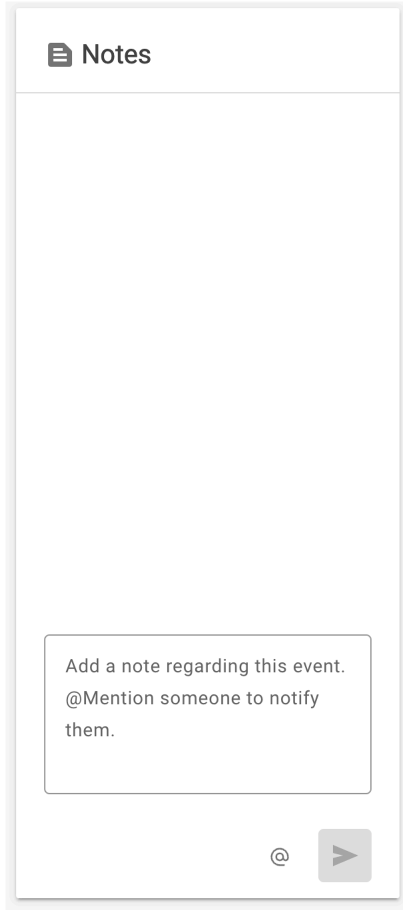
There are a few action items that you can take after you have reviewed the call. You can “archive” it if no further action is needed, you can “star” it if it needs further follow-up, or you can "share" the link to the call to share it with team members.



Call Notes

You can document each call and leave notes directly in the “Notes” section on the right-hand side of the patient profile. These notes are only visible to your organization, not the patient or caregiver. This is recommended for transparency and accountability and for handing off the call to other team members.

If you want to leave a note for a team member directly, you can “tag” them by typing @ and then their name. They will be notified that they’ve been mentioned in a patient record.



CheckUp Best Practices

Champion

We recommend having one designated Cortex Champion in your office responsible for reviewing CheckUp Calls (this may be different from the Champion reviewing Employee Surveys or other data in Cortex). The Champion reviews all CheckUp Calls and may delegate specific tasks to other team members based on a patient's needs in the CheckUp Call.

Call Urgency

As a best practice, most clients review calls with the following indicators within 24 hours (if not sooner):

- **Red dots:** Poor response from patient-reported
- **Calls with the following opportunities:** Reacquire Patient, Prevent Hospitalization, Improve Care or Complaints About Employees.

Reviewing Calls

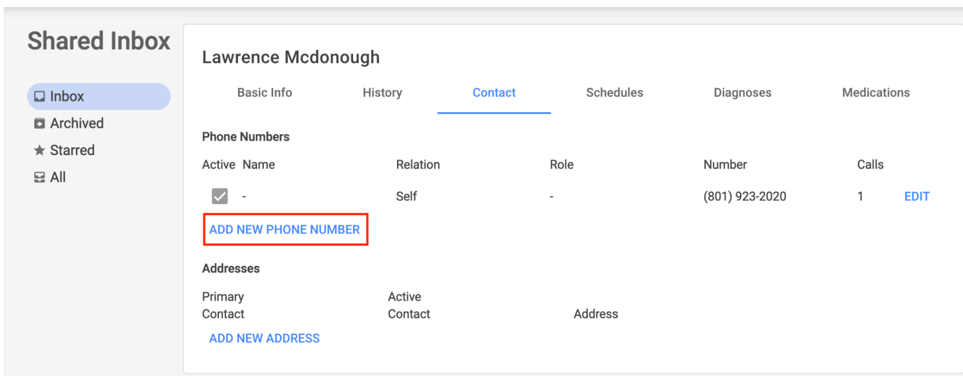
When reviewing a completed call, you should initially examine the patient demographics, the opportunity responses, and the question responses. If necessary, also check the call transcript or playback the call recording to get additional detail. The color of the question response indicates the severity of the reaction:

- **Green:** Good
- **Yellow:** Fair
- **Red:** Poor

Calls should be documented on in the notes section and "archived" once reviewed by the employee if no additional follow up is needed.

Wrong Number

If you see a "Wrong Number" outcome, the employee should check the patient's record for another phone number or better phone number to reach the patient or caretaker. An employee can add a new phone number to Cortex by pulling up a patient's profile and clicking "Add New Phone Number" in the Contact Information box.

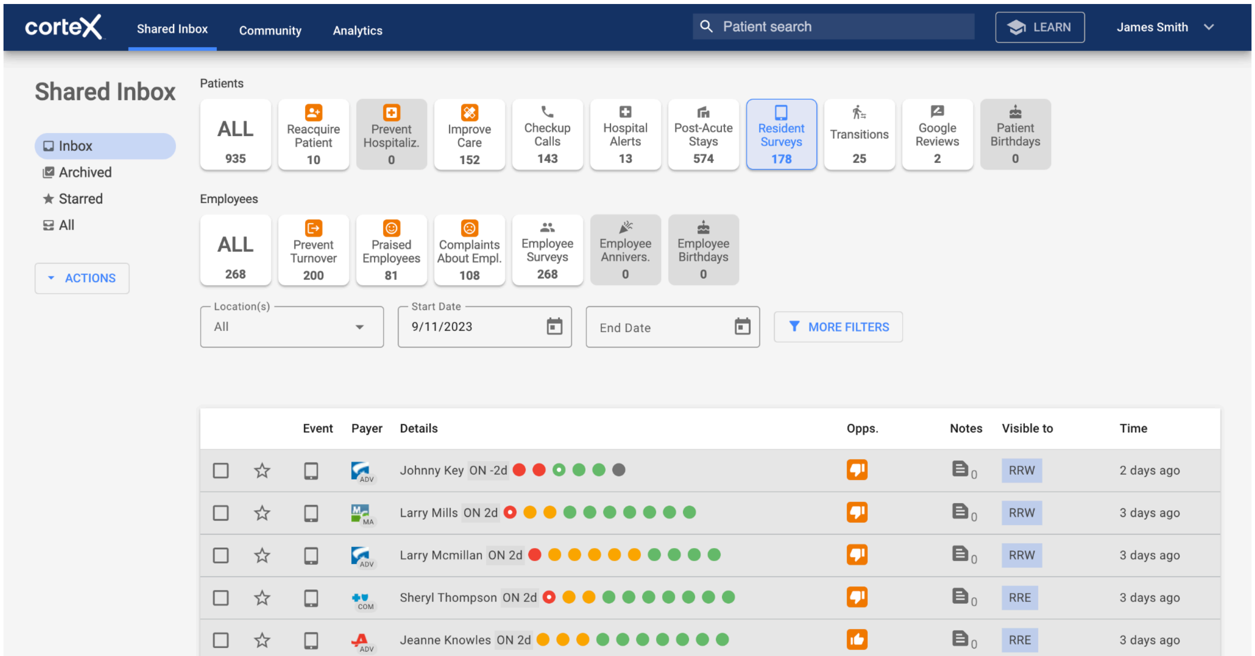


Resident Surveys

Resident Surveys List

The Resident Surveys List displays a log of each completed resident survey for your operation. Like CheckUp calls, you can see an overview of the survey responses on the resident survey list page. Each survey record displays colored dots indicating resident responses. Here is a key to the colors:

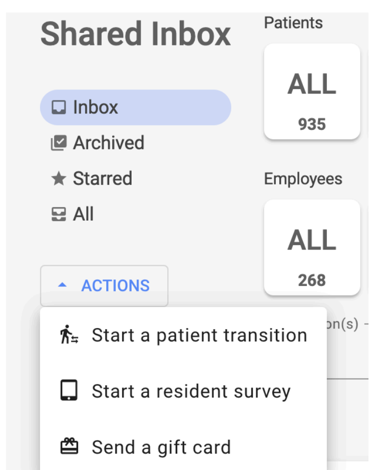
- **Green:** Good
- **Yellow:** Fair
- **Red:** Poor



The survey response template looks similar to patient call responses for ease of use. Before selecting a reply, you will see circles that will give an overview of whether the employee responded positively or negatively. Once you have selected a survey response, you will see notes your employee has provided on behalf of the patient.

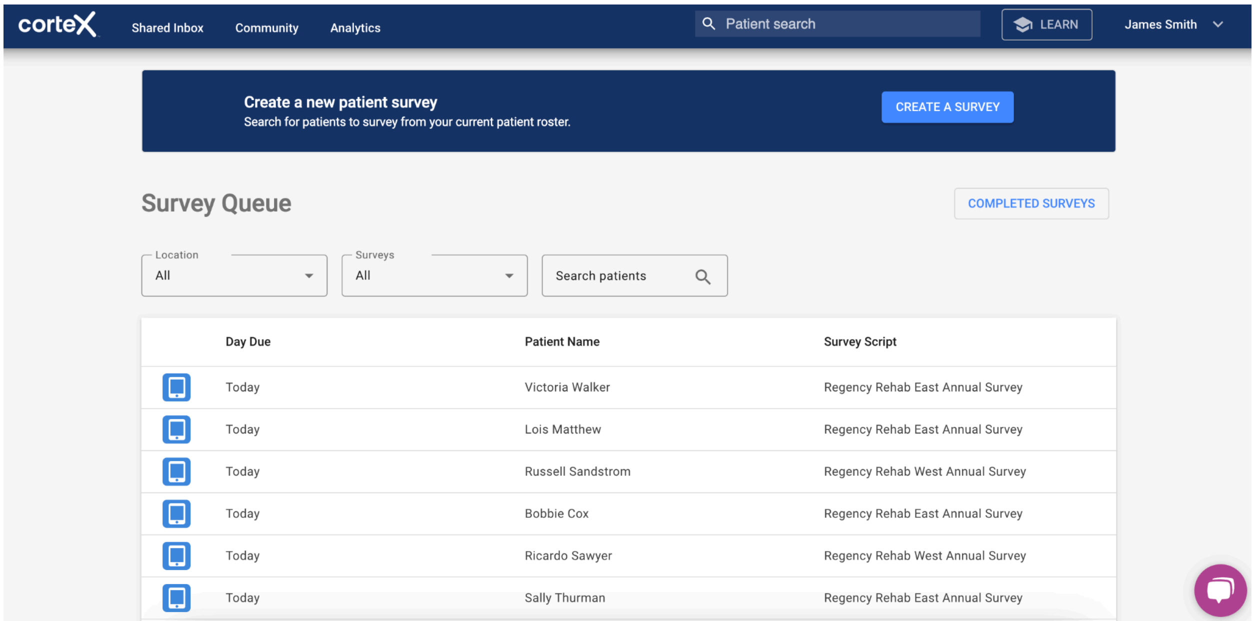
Survey Queue

When you click on 'Start a Resident Survey,' a list will appear with the upcoming surveys queued for your organization's patients.



The survey queue page will allow you to see which patient's surveys are coming up and when they are due. You can filter this page by organization and survey script.

You can also begin a new survey by clicking 'create a survey' at the top of your screen.



Resident Survey Best Practices

Champion

We recommend having one designated Cortex Champion in your office for Resident Surveys. The Patient Surveys champion in an SNF is often Social Services or Admissions.

When your staff visits patients, they can systematically ask them questions to assess their health, satisfaction, and understanding of care. This information flows into their patient dashboard and analytics for review.

The home page for this function is a list of all completed surveys. To start a new survey, click 'Start a Survey' at your screen's top right. The next page will be the survey queue, where you can select from available scheduled surveys.

Employee Surveys

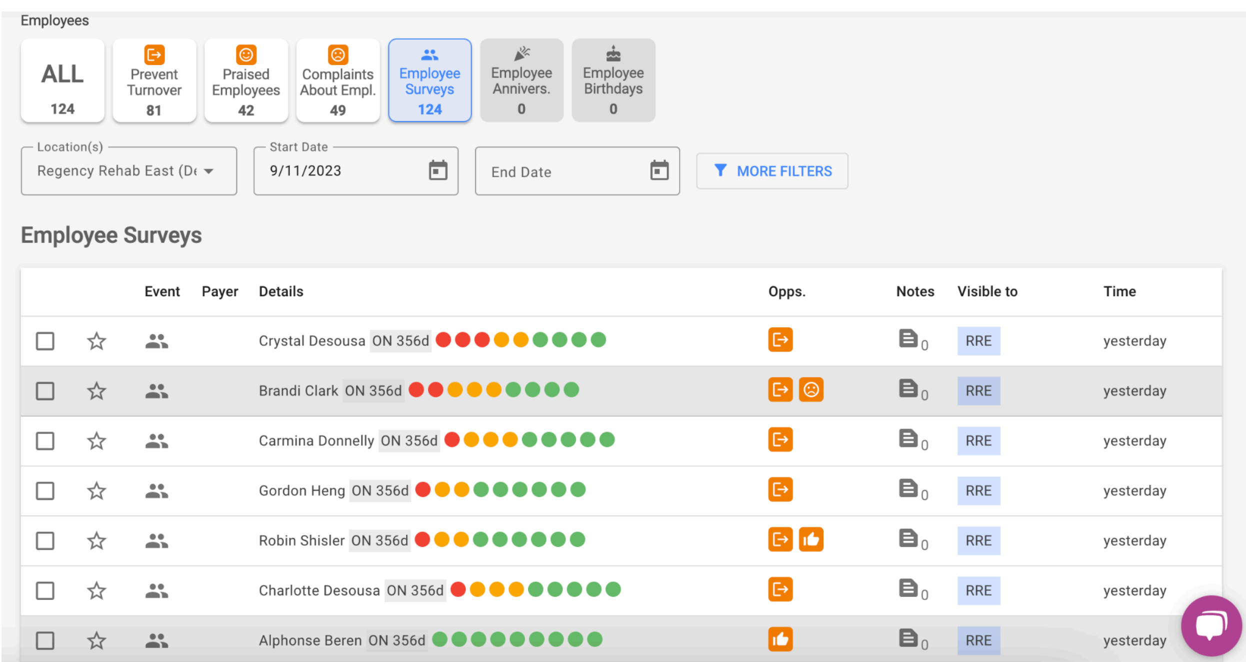
Discover How to Keep Your Employees Engaged and Thrilled With Their Jobs

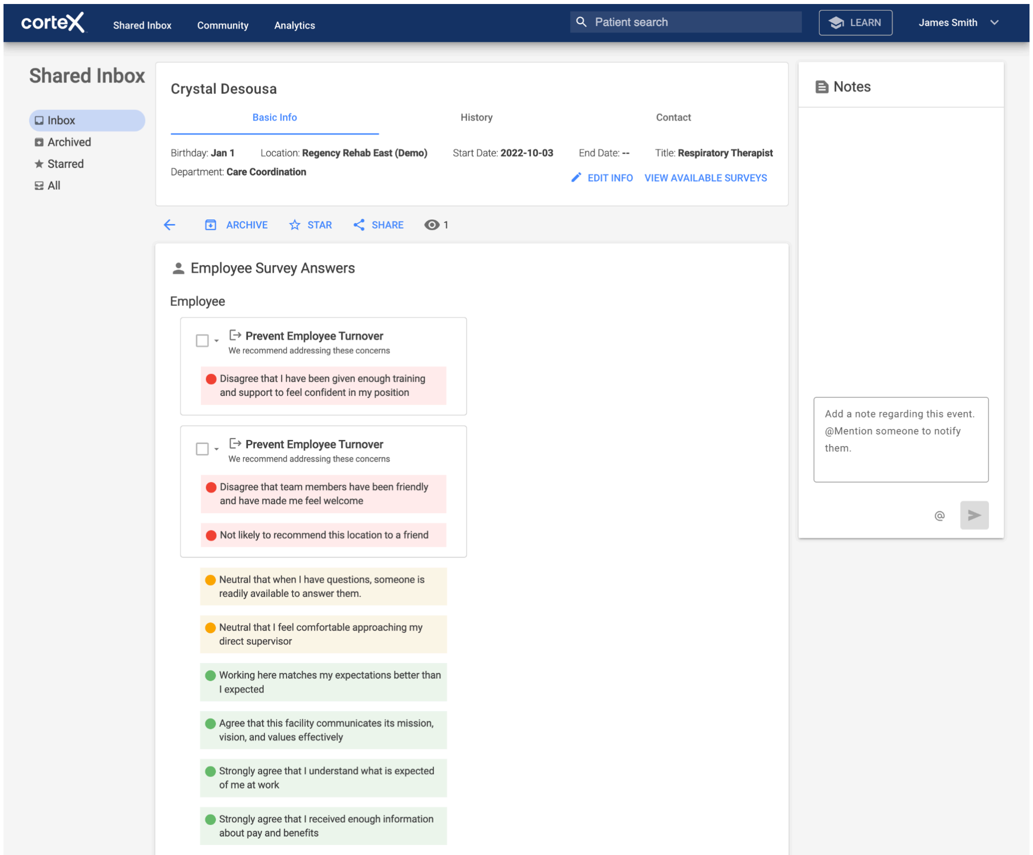
Cortex automatically conducts Employee Surveys to help improve job satisfaction and employee retention. Based on a predetermined schedule and employee preferences, the Cortex Platform will send either text messages or email reminders to employees (and sometimes both). We recommend that your HR representative is the one with access to this tool. If your HR representative cannot see the Employee Engagement tool, please contact Cortex, and we can make adjustments as needed.

View Completed Surveys

Under the Employee column in the platform, choose the “Employee Surveys” filter to view responses to your surveys and who completed them. Employees can submit answers anonymously, but you will still see their replies and hopefully solve the issues detected.

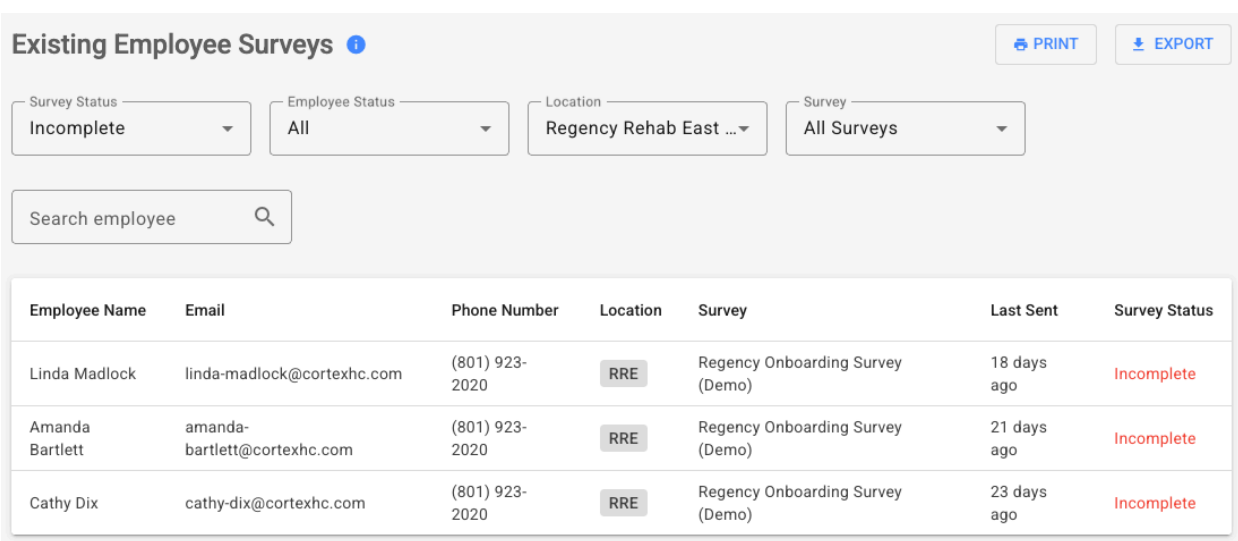
The survey response template looks similar to patient call responses for ease of use. Before selecting a reply, you will see circles that will give an overview of whether the employee responded positively or negatively. You can also see any opportunities generated from the survey response, such as “prevent turnover.” Once you have selected a survey response, you will see the notes your employee has provided.





Existing Employee Surveys Report

This report shows all employee surveys that are still open and can be completed. Use it to quickly identify employees who have not yet finished their survey so you can send reminders. You can filter by survey status, employee status, location, or survey type, and search for a specific employee.



Employee Name	Email	Phone Number	Location	Survey	Last Sent	Survey Status
Linda Madlock	linda-madlock@cortexhc.com	(801) 923-2020	RRE	Regency Onboarding Survey (Demo)	18 days ago	Incomplete
Amanda Bartlett	amanda-bartlett@cortexhc.com	(801) 923-2020	RRE	Regency Onboarding Survey (Demo)	21 days ago	Incomplete
Cathy Dix	cathy-dix@cortexhc.com	(801) 923-2020	RRE	Regency Onboarding Survey (Demo)	23 days ago	Incomplete

Employee Best Practices

Champion

We recommend having one designated Cortex Champion in your office for Employee Surveys, which is generally an HR or payroll representative. If your HR or payroll representative cannot see the Employee Engagement tool, please contact Cortex, and we can make adjustments as needed.

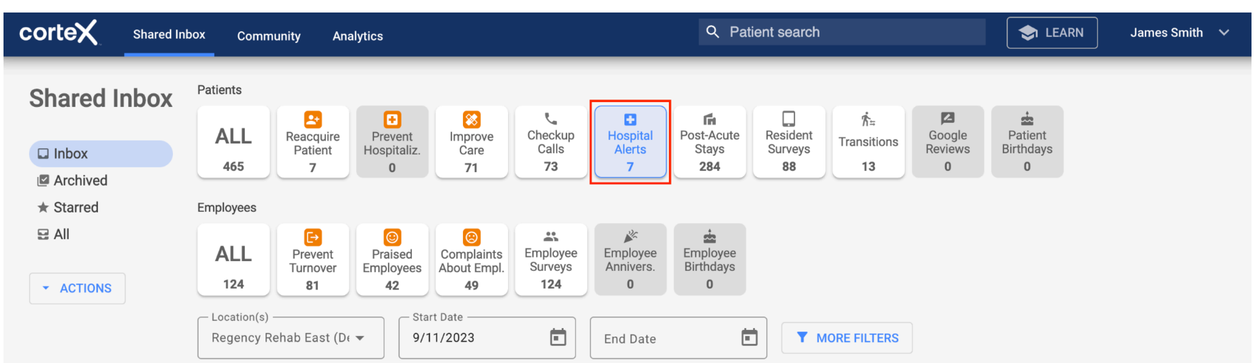
Employee Roster

The employee roster is where you can access all employee information. If you manage multiple locations, you can filter by organization by selecting 'organization' and changing it from 'all' to preferred locations. You can also add individual employees here and import that data on the 'employee upload' page.

Hospital Alerts

Cortex can alert your operation staff when any current or former patient goes to the hospital. This feature covers all hospitals in selected markets and includes notifications for emergency department visits, inpatient admissions, and discharges. Although regulations vary by state, Cortex can generally provide alerts for hospitalizations of any patient treated at your operation within the last 12 months.

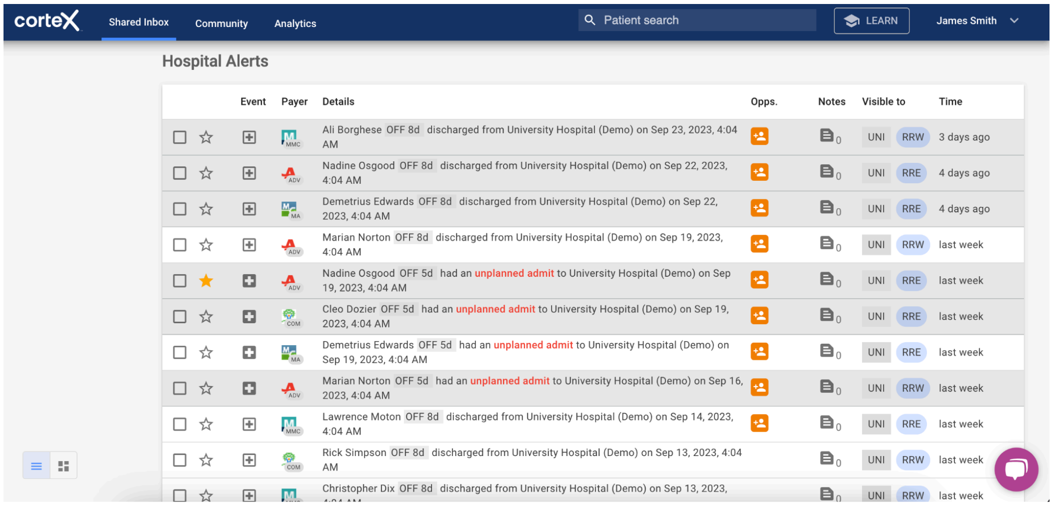
You can view a list of these alerts by clicking on the 'Hospital Alerts' tile, which looks like:



There are multiple filters on this page that you can change to fit your needs. You can see an overview of the alert that will provide you with vital information to triage the situation.

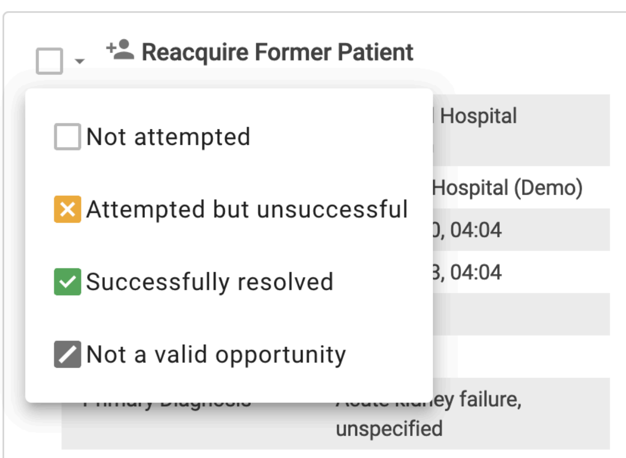
Reviewing Hospital Alerts

Reviewing on the hospital alerts list page:



If you want to learn more about the alert, click on the alert from the list view page. You will be brought to the patient profile. Here, you can view a history of events regarding the patient. Once you complete the review, click the 'Mark as Reviewed' box.

If there is a “Reacquire Patient” opportunity associated with the alert, it is important to resolve the opportunity once action has been taken. Remember, you can do so by clicking on the check box next to the Opportunity type in the profile and selecting the correct outcome.



Hospital Alerts Best Practices

Champion

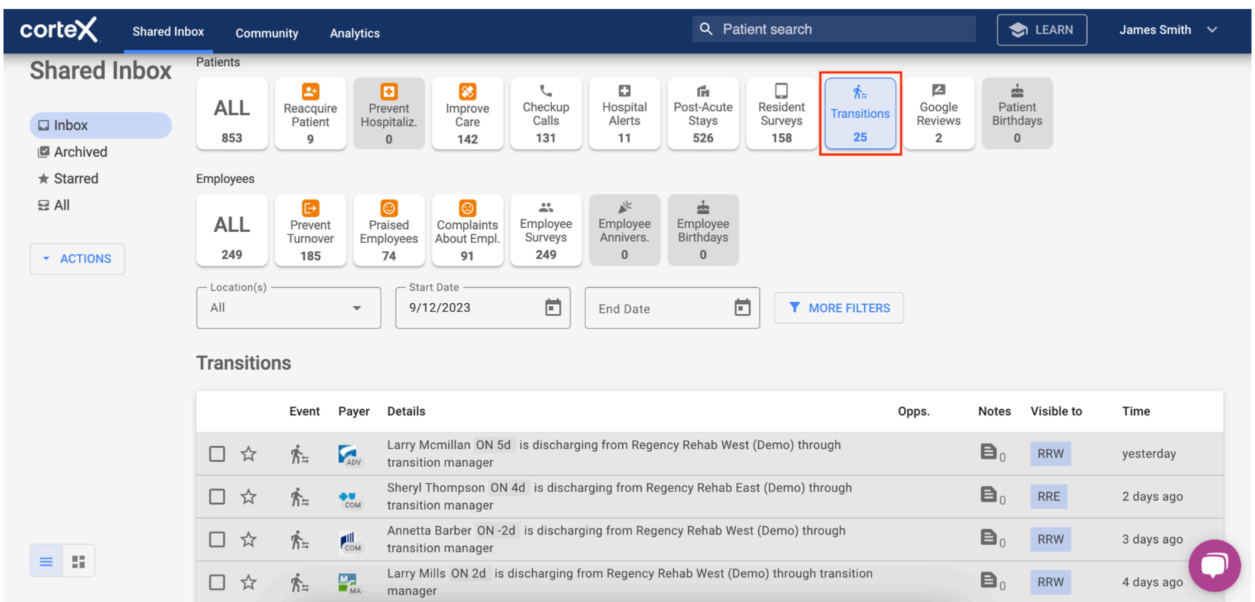
We recommend having one designated Cortex Champion in your office to review and respond to Hospital Alerts (this may be the same person as the Champion reviewing CheckUp Calls). This employee should review all hospital alerts (ED visits and unplanned hospital admissions) as quickly as possible. This employee should be signed up to receive email alerts whenever the Cortex Platform detects a hospital visit or admission.

Preventing a Readmission and Bringing a Patient Back on to Service

Emergency Department Visits are not penalizing readmissions - they are outpatient visits. Many customers practice immediately reaching out to the patient and hospital when they are in the ED to help direct them to an appropriate post-acute care level.

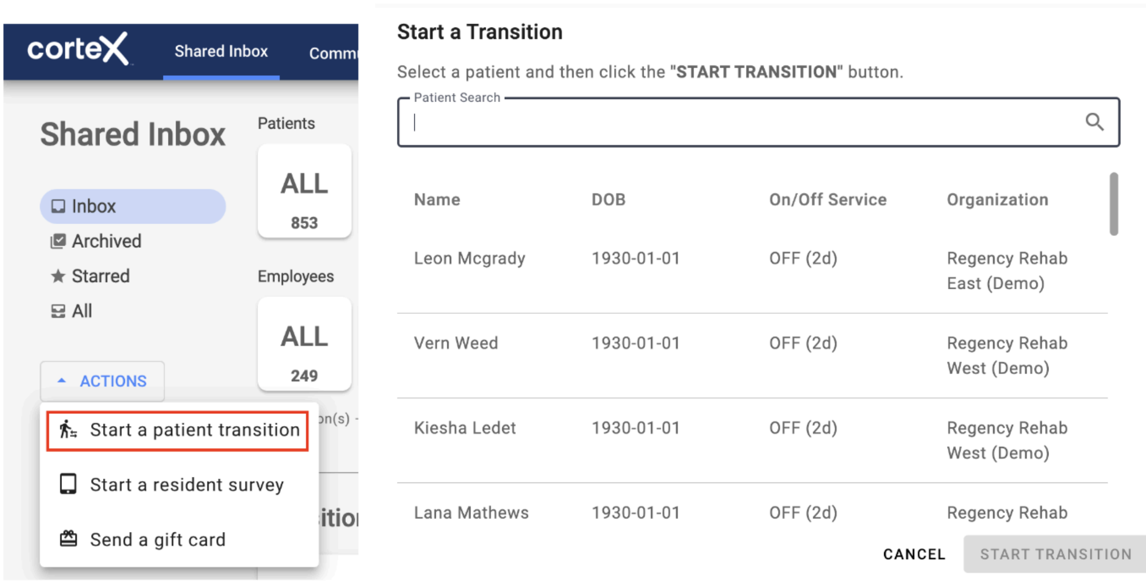
Transition Manager

No more faxing! Now, post-acute providers can send and receive referrals seamlessly.



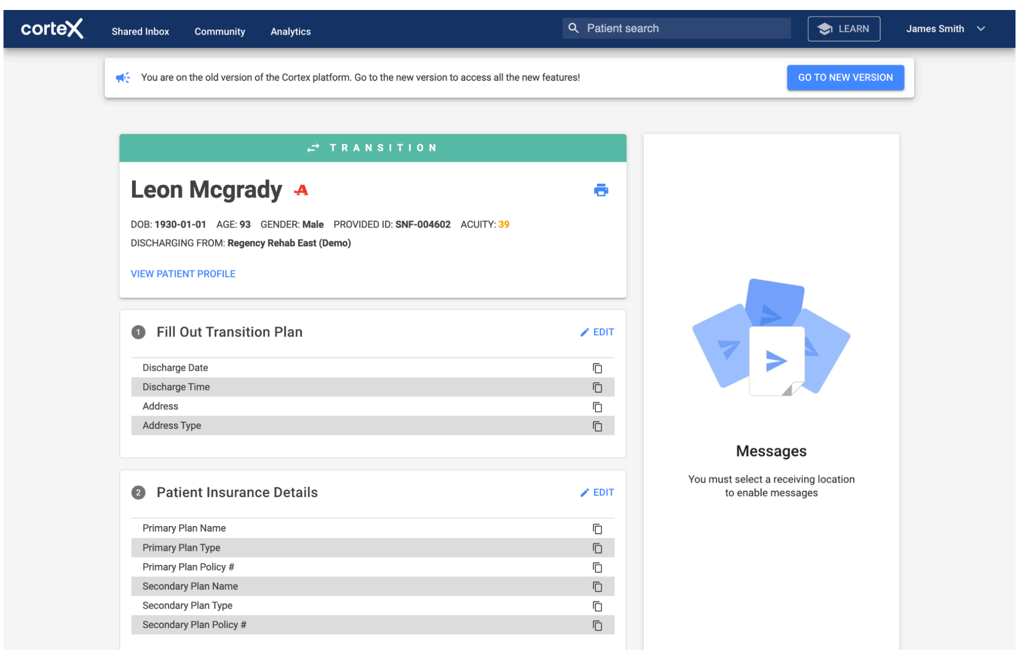
Transitions

As a discharge coordinator at an SNF, if you would like to start a new transition, click "Actions" on the left hand side of the screen and then "Start a patient transition." Search for and select the name of the patient you are initiating a Transition. Add details and documents appropriate to share for that patient's Transition.



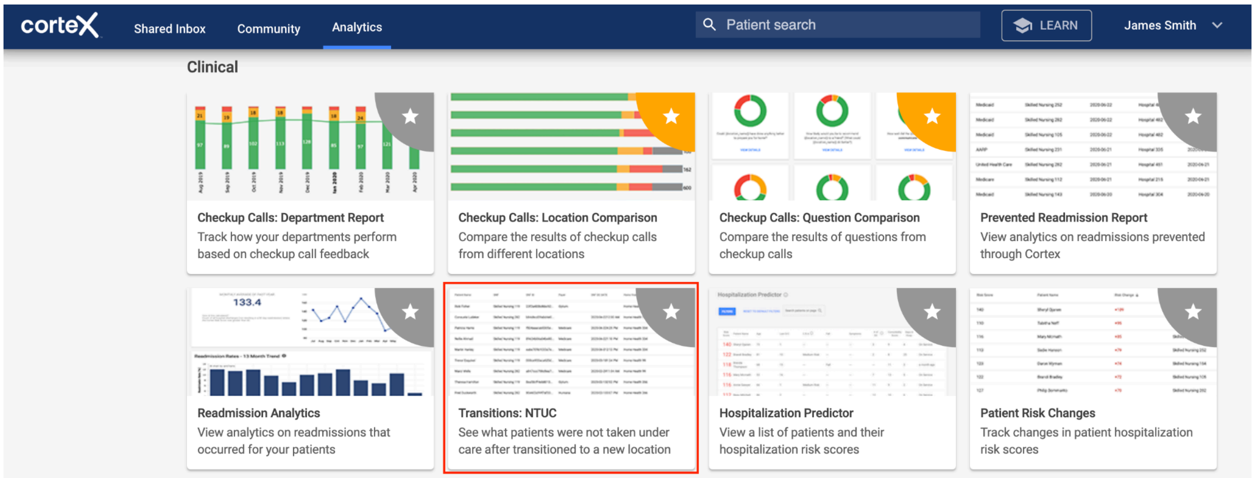
A home health agency's admissions department will receive an email stating a patient selected them as the preferred home health provider. The email contains a link to all information regarding the patient's Transition in the Cortex.

You can chat with the people involved with this Transition using the chat feature on the page's right-hand side.



NTUC

Patients Not Taken Under Care show up here on this report. The Cortex Platform generates this data by comparing planned transitions to patient admission in the home health electronic health records. If you notice a data error on this page, please chat with us using our chatbox.

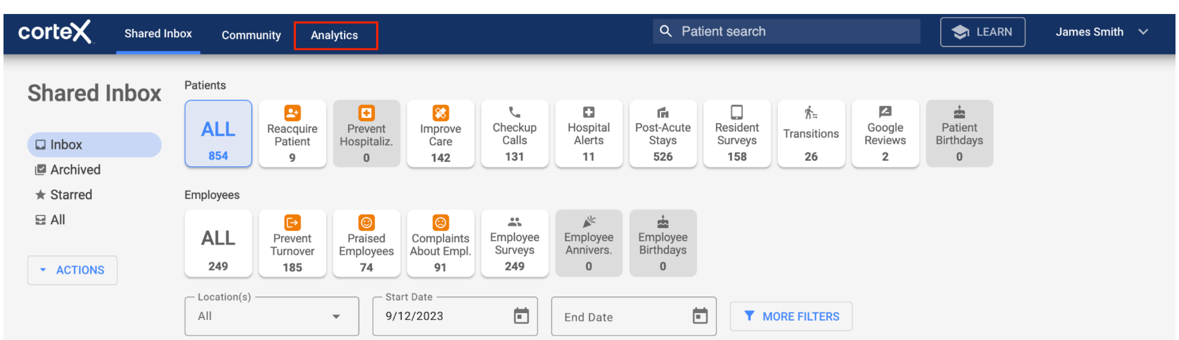


Preferences

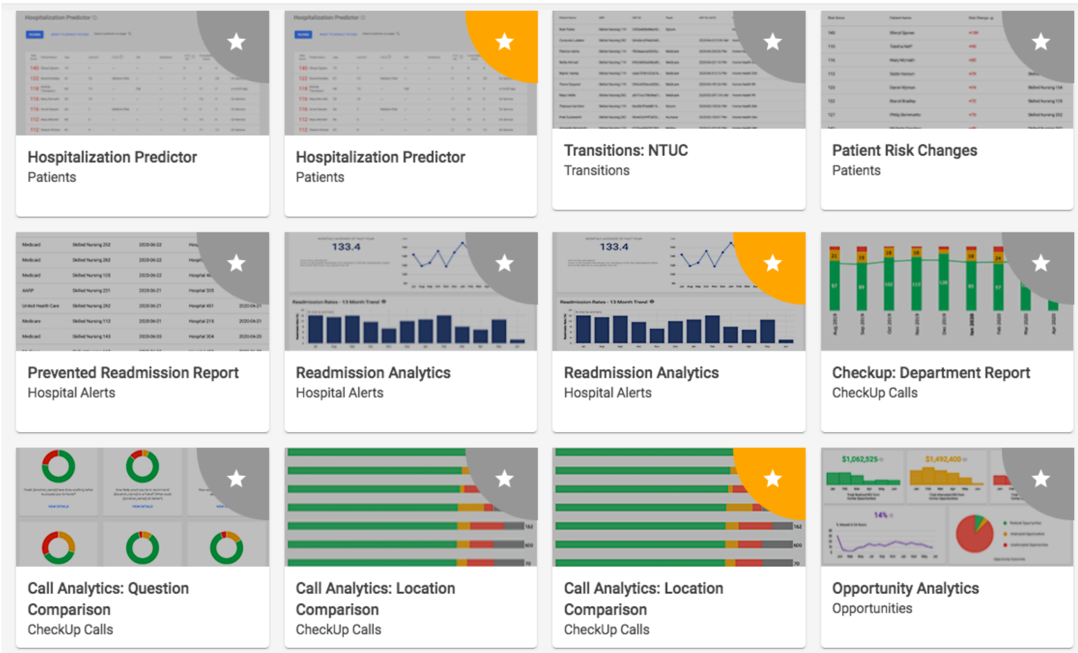
You can manage your email preferences regarding transitions in Transition Manager > Preferences. You will be able to select which facilities from which you would like to get notifications.

Reports and Analytics

Cortex provides a wide variety of detailed reports and analytics that summarize results and trends across all products. You can access and run reports in the Cortex platform anytime by clicking the "Analytics" button on any page's top-left side.



Reports are in five categories: Operational, Clinical, Satisfaction, Marketing, and Network. Within each, you can apply various filters or specify a particular date range using the drop-down menus at the top of the page.



FAQs

- How do you sync the patient and employee data?
  - Cortex connects with your EMR and/or HR software. Several times a week, we import your data into our system so we know who your patients/employees are and have the appropriate contact info for them. We also look for a listing of changes (i.e., terminations, discharges, payer changes, deceased events, and more).
- When are calls being made to patients?
  - Calls are typically made to your patients 7 days a week.. If you would like to adjust the days/hours to make calls to your patients, please use the chat on our website or contact us at success@cortexhc.com.
  - You can see the call script and schedule assigned to your operation on the Call Schedule Manager here: https://portal.cortexhc.com/checkup/call-schedule-manager.
- What phone number does the call show up on the patients' side?
  - Calls are programmed initially to show your operation's main phone number on the caller ID. Suppose you do not want your direct line to be the number that patients see. In that case, we can arrange to create a new number (same area code as your operation's number) with a "Satisfaction Line" recording and have an option for the patient to be connected to the operation's number.
- If a patient does not answer or is busy, how do we handle that? Do we call the patient back?
  - Suppose a Cortex nurse calls a patient without an answer, or the patient requests a call back later. In that case, the nurse will select either the "No Answer" or "Call back later" option on the call screen, and the patient will reenter back into the call queue (the patient will receive another call usually the next day).
  - We will attempt each scheduled call three times. For example, if we try to call the patient three times and they never answer, we will not try to call again until the next scheduled call.
- I need to adjust my email settings. How do I do that?
  - After logging into Cortex, select your name and then 'My Account.' Scrolling to the bottom of that page, you will see a box labeled 'Notification Preferences.'

- I'm trying to disable calls for a Pt., but she's not on Cortex yet. Please disable her.
    - Unfortunately, we can't proactively disable a patient. If you want to check back with us in a day or so after a new patient import, we can help you disable that patient.

- How long after people discharge are they put in your system?
    - Generally within 1-2 business days.

- I can't log in, and I'm just getting the spinning wheel.
    - Use this address: https://portal.cortexhc.com/login.
    - Alternatively, refresh the page or clear your browser's cache. See the section on "troubleshooting" for more detailed instructions.

- My team is not receiving any email alerts for our patients. I am still the only one receiving these for our office.
    - If your staff need to receive additional emails, please have them log into their cortex accounts, click on My Account, and from there, they can manage their email preferences.

- Why am I not receiving opportunity emails?
    - We've now overhauled the notifications so users can fine-tune which alerts they get. You can do this here:

  https://portal.cortexhc.com/my-account (scroll down to the Notifications section).

- Where can we download the mobile app?
    - You can download mobile apps here:
      OS: https://itunes.apple.com/us/app/cortex-health/id1448054240?ls=1&mt=8
  Android: https://play.google.com/store/apps/details?id=com.cortexhealth.cortexhealth

- How can I see who responded to a specific question? For example, I would like to see a particular patient's responses to the question on social service.
    - The closest thing to that would be under "Check Up," then "Call Analytics."