

# Cortex Customer Handbook

Last updated Aug 13, 2025

## Table of Contents

<b>Table of Contents</b>	<b>1</b>
<b>Cortex Overview</b>	<b>2</b>
<b>Getting Started</b>	<b>3</b>
Roles and Permissions	3
Logging In	4
Changing your password	4
Forgot Password	5
Notification Preferences	5
Notification Best Practices	6
Troubleshooting and Support	6
Self-Support	6
Mobile App	7
Knowledge Base	7
General Tips and Tricks	8
Filters	8
List View vs Card View	8
Patient Records	9
Deactivating a Patient	9
Marking a Patient as Deceased	11
Inaccurate Information	11
Leaving a Note	12
<b>Opportunities</b>	<b>12</b>
Opportunity Types	12
How to Mark an Opportunity as Complete	14
<b>CheckUp Calls</b>	<b>15</b>
Shared Inbox	15
Reviewing A Call	16
Call Notes	17
CheckUp Best Practices	18
Champion	18

Call Urgency	18
Reviewing Calls	19
Wrong Number	19
<b>Resident Surveys</b>	<b>19</b>
Resident Surveys List	19
Survey Queue	20
Resident Survey Best Practices	21
Champion	21
<b>Employee Surveys</b>	<b>22</b>
Discover How to Keep Your Employees Engaged and Thrilled With Their Jobs	22
View Completed Surveys	22
Existing Employee Surveys Report	23
Employee Best Practices	24
Champion	24
Employee Roster	24
<b>Hospital Alerts</b>	<b>24</b>
Reviewing Hospital Alerts	25
Reviewing on the hospital alerts list page:	25
Hospital Alerts Best Practices	26
Champion	26
Preventing a Readmission and Bringing a Patient Back on to Service	26
<b>Transition Manager</b>	<b>26</b>
Transitions	26
NTUC	28
Preferences	28
<b>Reports and Analytics</b>	<b>28</b>
<b>FAQs</b>	<b>30</b>

## 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](mailto:success@cortexhc.com).

## Getting Started

Welcome to Cortex! To receive a Cortex login, please have your administrator contact us ([success@cortexhc.com](mailto: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.

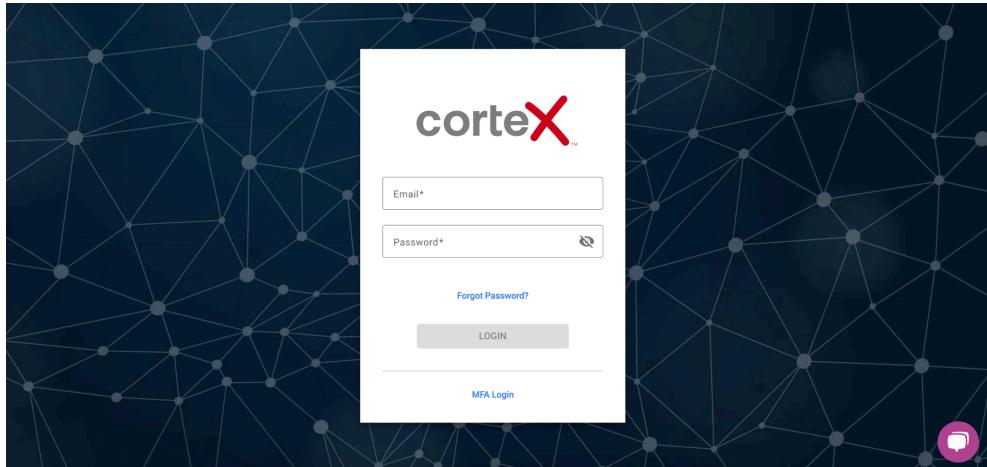
## Roles and Permissions

- **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

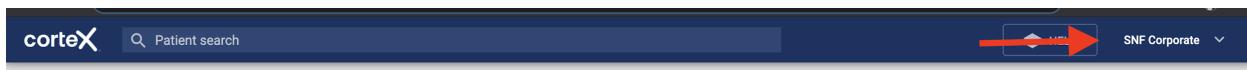
- Open your Google Chrome<sup>1</sup> web browser or your Cortex App.
- Navigate to <https://portal.cortexhc.com> and enter your credentials in the appropriate boxes. The Cortex Success Team should have sent this link and your credentials to you via email<sup>2</sup>.
- The login page looks like this:



## 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:

<sup>1</sup> The Cortex platform works best on Google Chrome.

<sup>2</sup> If you do not receive an email, please contact your administrator or email [success@cortexhc.com](mailto:success@cortexhc.com)

### Change Password

Re-enter Old Password  

New Password  

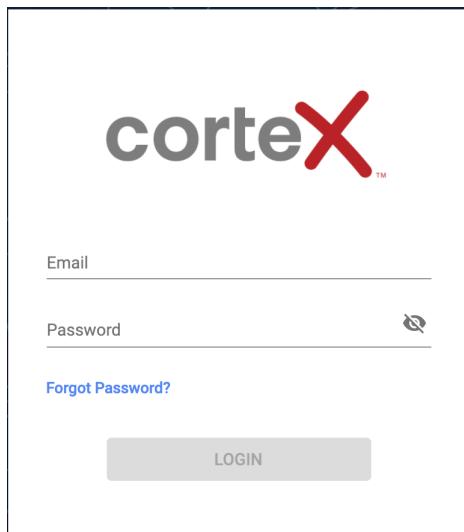
 must contain at least 1 letter  
 must contain at least 1 number  
 must contain at least 1 special character  
 must contain at least 9 characters

- 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.

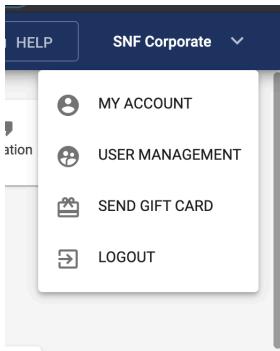
### Notification Preferences

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.

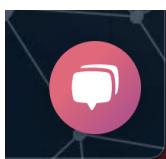
## Notification Best Practices

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](mailto: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
  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](mailto: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.



## Knowledge Base

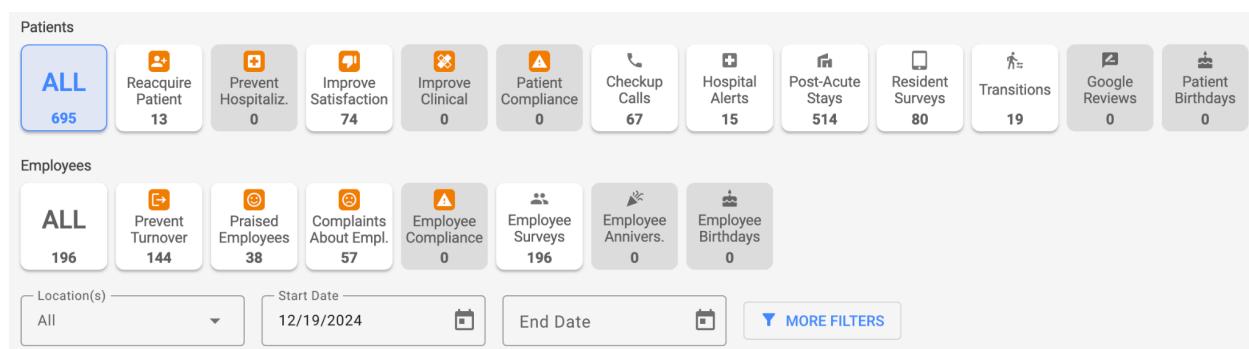
Cortex has an extensive Knowledge Base where you can find tons of helpful information about the Cortex platform as well as release notes and recordings of our monthly webinars. You can access this clicking on the "Learn" button in the upper right hand corner of your screen.



## 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



The screenshot shows a dashboard with two main sections: Patients and Employees. The Patients section includes metrics like 'ALL 695', 'Reacquire Patient 13', 'Prevent Hospitaliz. 0', 'Improve Satisfaction 74', 'Improve Clinical 0', 'Patient Compliance 0', 'Checkup Calls 67', 'Hospital Alerts 15', 'Post-Acute Stays 514', 'Resident Surveys 80', 'Transitions 19', 'Google Reviews 0', and 'Patient Birthdays 0'. The Employees section includes metrics like 'ALL 196', 'Prevent Turnover 144', 'Praised Employees 38', 'Complaints About Empl. 57', 'Employee Compliance 0', 'Employee Surveys 196', 'Employee Annivers. 0', and 'Employee Birthdays 0'. Below these sections are dropdowns for 'Location(s)' (All), 'Start Date' (12/19/2024), 'End Date', and a 'MORE FILTERS' button.

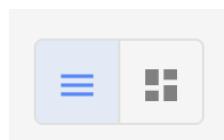
Each Cortex product home page and report will have a set of filters relevant to the data within that product. If you ever find any data missing, check the filters to ensure they are correct for what you want.

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:

Event	Payer	Details	Opps.	Notes	Visible to	Time			
<input type="checkbox"/>									2 days ago
<input type="checkbox"/>									3 days ago
<input type="checkbox"/>									3 days ago
<input type="checkbox"/>									3 days ago
<input type="checkbox"/>									3 days ago
<input type="checkbox"/>									3 days ago
<input type="checkbox"/>									3 days ago
<input type="checkbox"/>									3 days ago

**Card view** will present patient and employee information like this:

### Checkup Calls

Employee/Patient	Status	Opportunities	Team	Last Update
Lawrence McDonough	OFF 8d		RRE	2 days ago
Annetta Best	OFF 8d		RRW	3 days ago
Dana Elliott	OFF 8d		RRW UNI	3 days ago
Ashley Beebe	OFF 8d	Opportunities: ☺ ☺	RRE	3 days ago
Raymond Scharmer	OFF 8d	Opportunities: ☺ ☺	RRE	3 days ago
Emily Fitzgerald	OFF 8d	Opportunities: ☺ ☺	RRE	3 days ago
Ashley Beren	OFF 8d	Opportunities: ☺ ☺	RRE	3 days ago
Frances Gutierrez	OFF 8d	Opportunities: ☺ ☺	RRW	3 days ago
Stephanie Tharp	OFF 8d	Opportunities: ☺ ☺	RRE	3 days ago
Donald Edmonds	OFF 8d			
Ali Borghese	OFF 8d			
Andrew Badger	OFF 8d			

## 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.

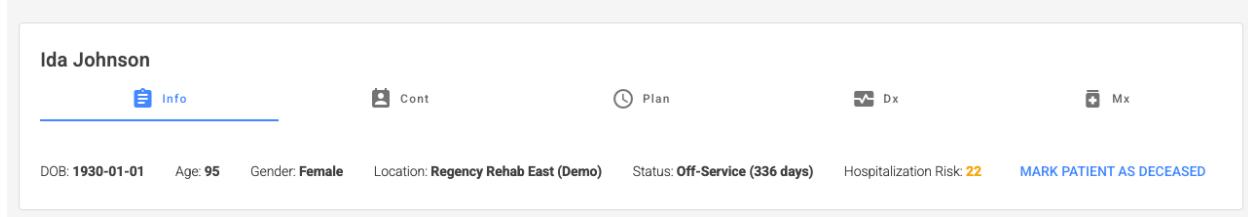
Here is how to deactivate a patient:

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



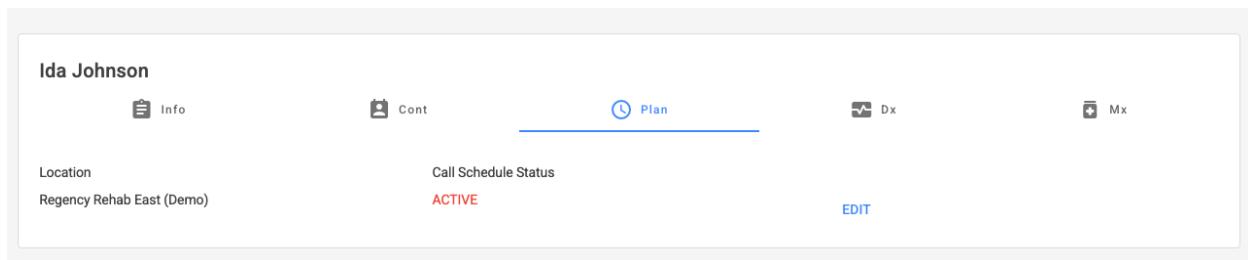
The screenshot shows the Cortex platform interface. At the top, there is a dark blue header with the Cortex logo on the left, followed by 'Shared Inbox', 'Community', and 'Analytics' buttons. A search bar in the center contains the text 'Ida Johnston'. To the right of the search bar is a 'LEARN' button with a graduation cap icon. Further right is a user profile for 'James Smith' with a dropdown arrow. Below the header, a banner displays the text 'Ida Johnston | DOB: 1930-01-01'.

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



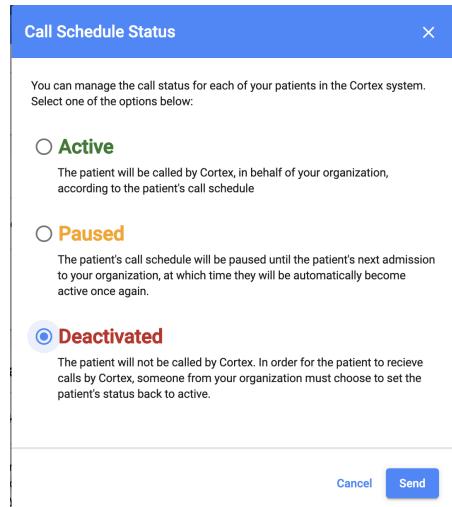
The screenshot shows the patient profile for 'Ida Johnson'. At the top, there is a navigation bar with tabs: 'Info' (which is underlined in blue), 'Cont', 'Plan', 'Dx', and 'Mx'. Below the navigation bar, patient details are listed: DOB: 1930-01-01, Age: 95, Gender: Female, Location: Regency Rehab East (Demo), Status: Off-Service (336 days), Hospitalization Risk: 22, and a 'MARK PATIENT AS DECEASED' button.

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



The screenshot shows the 'Plan' tab of the patient profile for 'Ida Johnson'. The tab is highlighted with a blue underline. Below the tab, there are two sections: 'Location' (Regency Rehab East (Demo)) and 'Call Schedule Status' (ACTIVE). To the right of the 'ACTIVE' status is a blue 'EDIT' button.

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.



The screenshot shows a modal dialog titled 'Call Schedule Status' with a blue header bar and a white body. The body contains a message: 'You can manage the call status for each of your patients in the Cortex system. Select one of the options below.' Below the message are three radio button options: 'Active' (selected), 'Paused', and 'Deactivated'. Each option has a description: 'Active' (The patient will be called by Cortex, in behalf of your organization, according to the patient's call schedule), 'Paused' (The patient's call schedule will be paused until the patient's next admission to your organization, at which time they will be automatically become active once again), and 'Deactivated' (The patient will not be called by Cortex. In order for the patient to receive calls by Cortex, someone from your organization must choose to set the patient's status back to active). At the bottom of the dialog are 'Cancel' and 'Send' buttons.

## Marking a Patient as Deceased

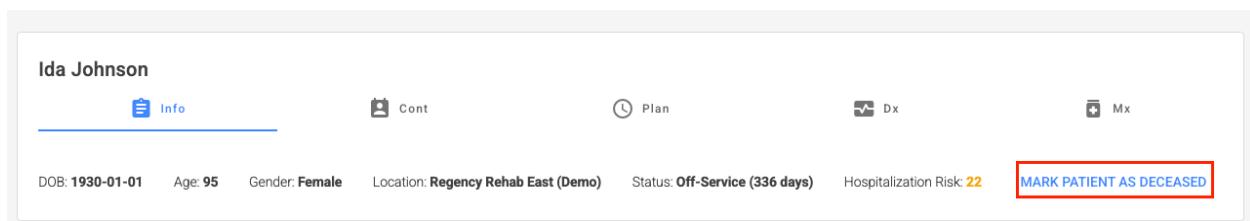
The best way to avoid having Cortex call deceased patients is to mark patients as Deceased within the platform. Usually, this data will come from your EMR, but this data fails to sync in some cases.

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](mailto:success@cortexhc.com), and we will correct the error.

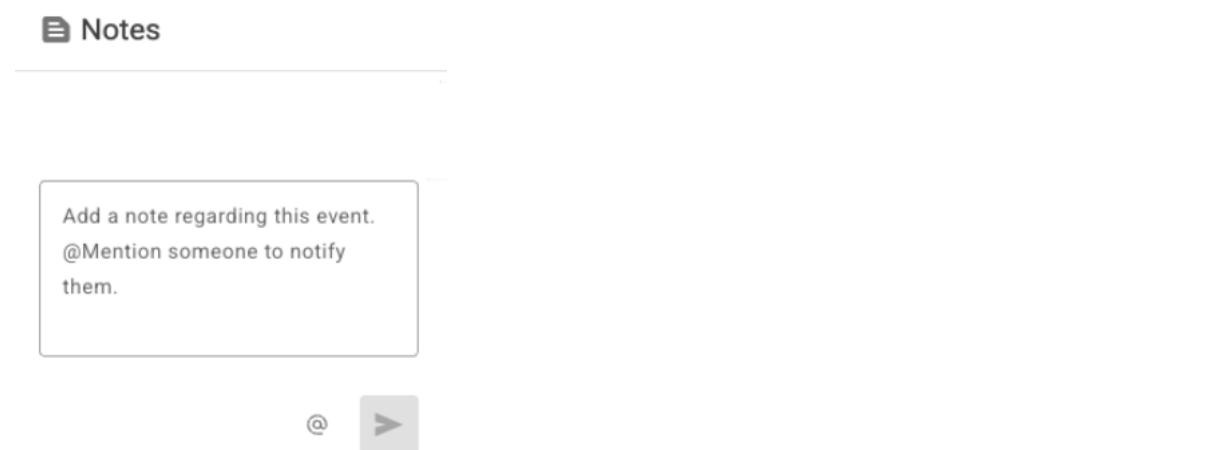
## Inaccurate Information

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](mailto: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](mailto: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

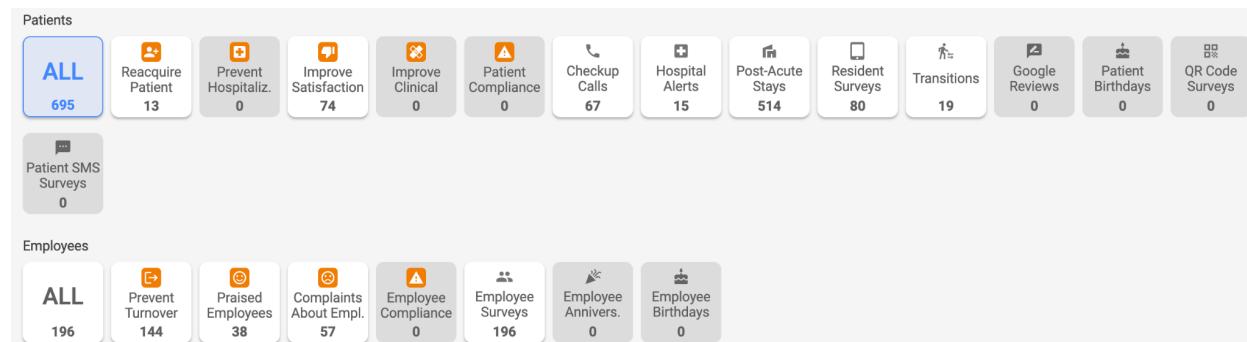
7. **Praised Employees** - A current or former patient has given praise to a specific employee on your team

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](mailto: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.



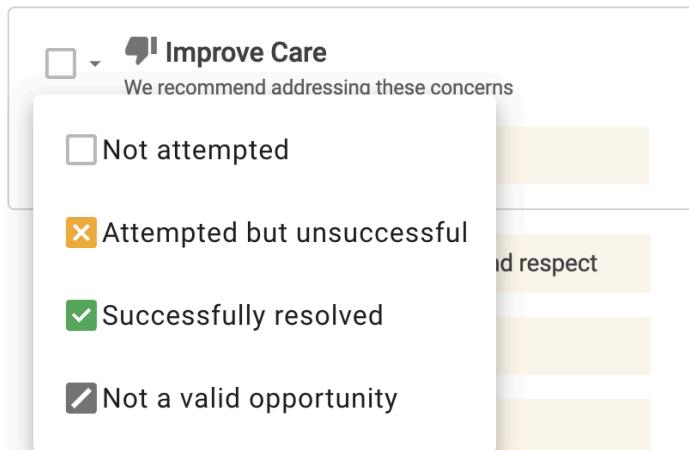
## How to Mark an Opportunity as Complete

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:

#### Satisfaction

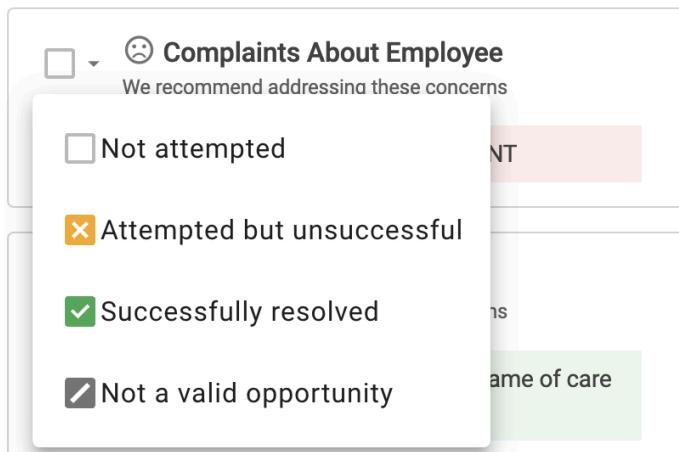


A screenshot of a patient opportunity interface. The title is 'Satisfaction' with a sub-section 'Improve Care'. Below it, a note says 'We recommend addressing these concerns'. There are four options with checkboxes: 'Not attempted' (unchecked), 'Attempted but unsuccessful' (checked with an orange X), 'Successfully resolved' (checked with a green checkmark), and 'Not a valid opportunity' (unchecked). Each option has a corresponding colored bar to its right: light orange for 'Not attempted', orange for 'Attempted but unsuccessful', light green for 'Successfully resolved', and light yellow for 'Not a valid opportunity'.

Opportunity Status	Color Bar
Not attempted	Light Orange
Attempted but unsuccessful	Orange
Successfully resolved	Light Green
Not a valid opportunity	Light Yellow

### Employee Opportunity Example:

#### Employee



A screenshot of an employee opportunity interface. The title is 'Employee' with a sub-section 'Complaints About Employee'. Below it, a note says 'We recommend addressing these concerns'. There are four options with checkboxes: 'Not attempted' (unchecked), 'Attempted but unsuccessful' (checked with an orange X), 'Successfully resolved' (checked with a green checkmark), and 'Not a valid opportunity' (unchecked). Each option has a corresponding colored bar to its right: pink for 'Not attempted', orange for 'Attempted but unsuccessful', light green for 'Successfully resolved', and light blue for 'Not a valid opportunity'.

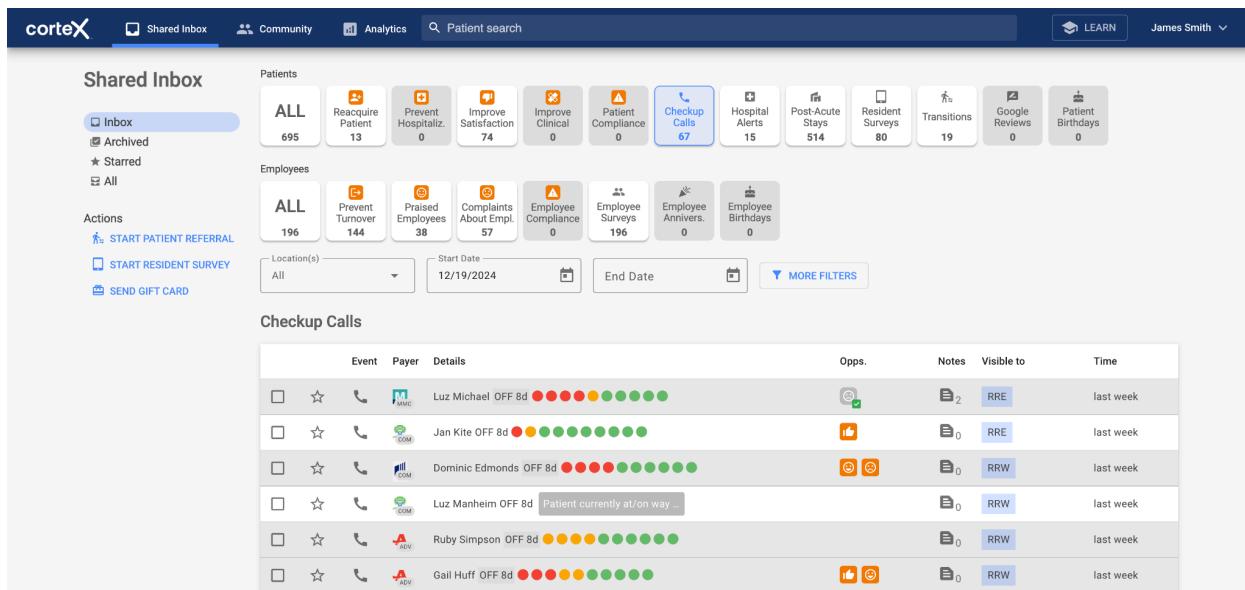
Opportunity Status	Color Bar
Not attempted	Pink
Attempted but unsuccessful	Orange
Successfully resolved	Light Green
Not a valid opportunity	Light Blue

# 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."



The screenshot shows the Cortex platform's Shared Inbox. At the top, there are filters for 'Patients' and 'Employees'. Under 'Patients', the 'Checkup Calls' filter is selected, showing 67 results. The 'Employees' section also shows various filters. Below these are buttons for 'START PATIENT REFERRAL', 'START RESIDENT SURVEY', and 'SEND GIFT CARD'. The main area displays a table of 'Checkup Calls' with the following columns: Event, Payer, Details, Opps., Notes, Visible to, and Time. The table lists several calls made to patients like Luz Michael, Jan Kite, Dominic Edmonds, Luz Manheim, Ruby Simpson, and Gail Huff, each with a unique combination of event details, payer, and call outcomes.

Event	Payer	Details	Opps.	Notes	Visible to	Time
Starred	Mac	Luz Michael OFF 8d	Green, Yellow, Red bubbles	2	RRE	last week
Starred	COM	Jan Kite OFF 8d	Yellow, Green bubbles	0	RRE	last week
Starred	Mac	Dominic Edmonds OFF 8d	Red, Yellow, Green bubbles	0	RRW	last week
Starred	COM	Luz Manheim OFF 8d	Yellow, Green bubbles	0	RRW	last week
Starred	ADV	Ruby Simpson OFF 8d	Yellow, Green bubbles	0	RRW	last week
Starred	ADV	Gail Huff OFF 8d	Red, Yellow, Green bubbles	0	RRW	last week

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

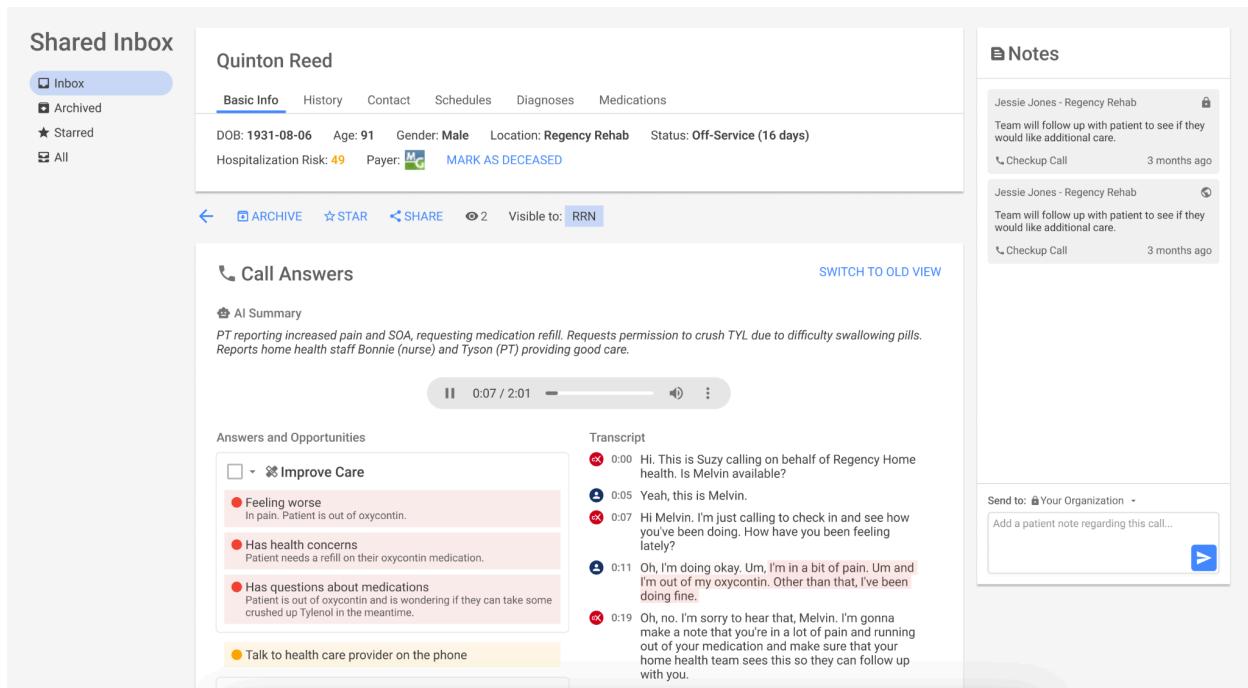
## Reviewing A Call

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



Event	Payer	Details	Opps.	Notes	Visible to	Time
□	☆	📞 Lawrence McDonough OFF 8d	● ● ● ● ● ● ● ● ● ●	0	RRE	yesterday

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.



Shared Inbox

Inbox Archived Starred All

Quinton Reed

Basic Info History Contact Schedules Diagnoses Medications

DOB: 1931-08-06 Age: 91 Gender: Male Location: Regency Rehab Status: Off-Service (16 days)

Hospitalization Risk: 49 Payer: MG MARK AS DECEASED

◀ ARCHIVE ☆ STAR 🔍 SHARE ⚡ 2 Visible to: RRN

📞 Call Answers SWITCH TO OLD VIEW

AI Summary

PT reporting increased pain and SOA, requesting medication refill. Requests permission to crush TYL due to difficulty swallowing pills. Reports home health staff Bonnie (nurse) and Tyson (PT) providing good care.

0:07 / 2:01

Answers and Opportunities

Improve Care

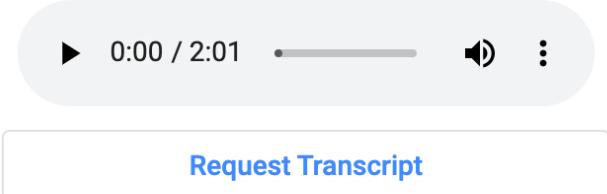
- Feeling worse In pain. Patient is out of oxycontin.
- Has health concerns Patient needs a refill on their oxycontin medication.
- Has questions about medications Patient is out of oxycontin and is wondering if they can take some crushed up Tylenol in the meantime.
- Talk to health care provider on the phone

Transcript

0:00 Hi. This is Suzy calling on behalf of Regency Home health. Is Melvin available?  
0:05 Yeah, this is Melvin.  
0:07 Hi Melvin. I'm just calling to check in and see how you've been doing. How have you been feeling lately?  
0:11 Oh, I'm doing okay. Um, I'm in a bit of pain. Um and I'm out of my oxycontin. Other than that, I've been doing fine.  
0:19 Oh, no. I'm sorry to hear that, Melvin. I'm gonna make a note that you're in a lot of pain and running out of your medication and make sure that your home health team sees this so they can follow up with you.

Send to: Your Organization Add a patient note regarding this call... ▶

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



0:00 / 2:01

Request 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.

How well did our nurse do on this call?



Any feedback regarding this call?

/

SUBMIT

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.



ARCHIVE



STAR



SHARE

Visible To:

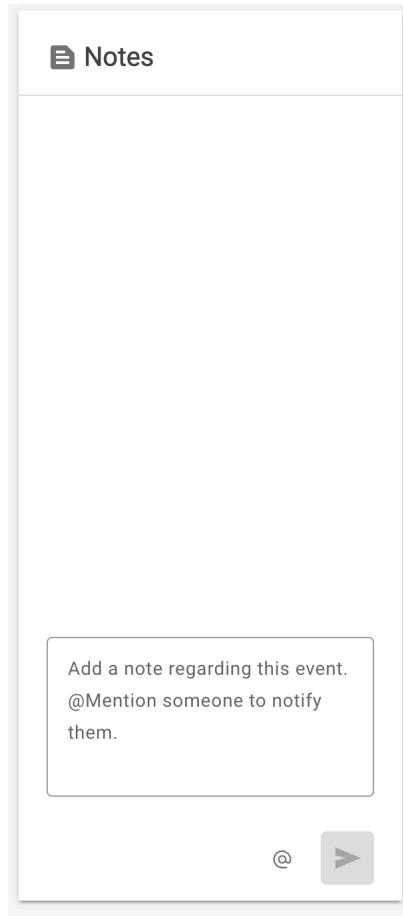
RRE



## 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

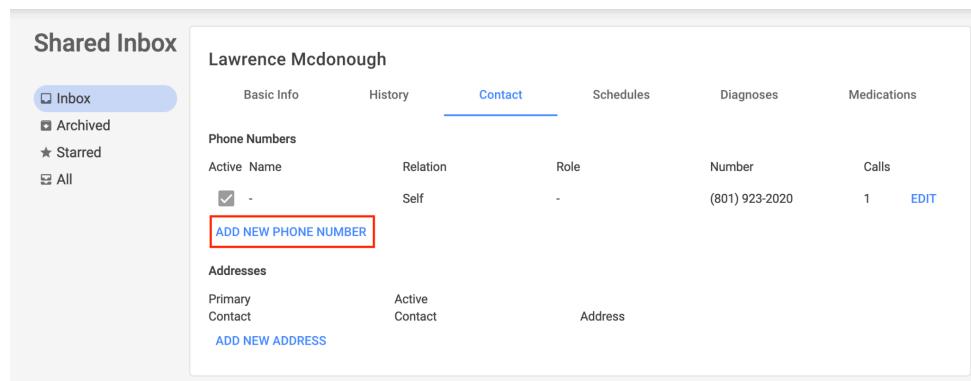
When reviewing a completed call, you should initially examine the patient demographics, the opportunity responses, and the question responses. If necessary, also check the call transcript or playback the call recording to get additional detail. The color of the question response indicates the severity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



Active Name	Relation	Role	Number	Calls
<input checked="" type="checkbox"/> -	Self	-	(801) 923-2020	1

## 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

**Shared Inbox**

**Patients**

- Inbox** ALL 935
- Reacquire Patient** 10
- Prevent Hospitaliz.** 0
- Improve Care** 152
- Checkup Calls** 143
- Hospital Alerts** 13
- Post-Acute Stays** 574
- Resident Surveys** 178
- Transitions** 25
- Google Reviews** 2
- Patient Birthdays** 0

**Employees**

- ALL** 268
- Prevent Turnover** 200
- Praised Employees** 81
- Complaints About Empl.** 108
- Employee Surveys** 268
- Employee Annivers.** 0
- Employee Birthdays** 0

Location(s): All, Start Date: 9/11/2023, End Date: [date], [MORE FILTERS](#)

Event	Payer	Details	Opps.	Notes	Visible to	Time				
<input type="checkbox"/>				Johnny Key ON 2d	<span style="color: red;">●</span> <span style="color: orange;">●</span> <span style="color: green;">●</span> <span style="color: green;">●</span> <span style="color: grey;">●</span>			0	RRW	2 days ago
<input type="checkbox"/>				Larry Mills ON 2d	<span style="color: red;">●</span> <span style="color: orange;">●</span> <span style="color: green;">●</span>			0	RRW	3 days ago
<input type="checkbox"/>				Larry Mcmillan ON 2d	<span style="color: red;">●</span> <span style="color: orange;">●</span> <span style="color: orange;">●</span> <span style="color: orange;">●</span> <span style="color: orange;">●</span> <span style="color: green;">●</span> <span style="color: green;">●</span> <span style="color: green;">●</span>			0	RRW	3 days ago
<input type="checkbox"/>				Sheryl Thompson ON 2d	<span style="color: red;">●</span> <span style="color: orange;">●</span> <span style="color: green;">●</span>			0	RRE	3 days ago
<input type="checkbox"/>				Jeanne Knowles ON 2d	<span style="color: orange;">●</span> <span style="color: orange;">●</span> <span style="color: green;">●</span>			0	RRE	3 days ago

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.

**Shared Inbox**

**Patients**

- Inbox** ALL 935
- Archived**
- Starred**
- All**

**Employees**

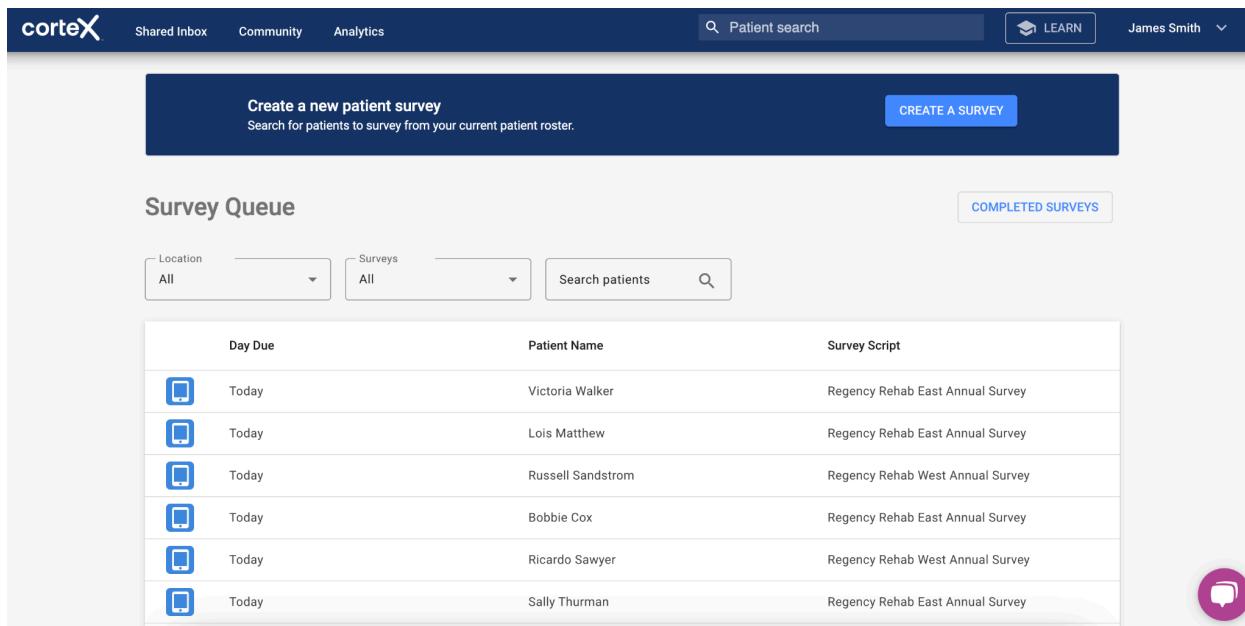
- ALL** 268

**ACTIONS**

- Start a patient transition
- Start a resident survey
- Send a gift card

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.



The screenshot shows the Cortex Health Patient Surveys interface. At the top, there is a navigation bar with links for 'Shared Inbox', 'Community', 'Analytics', 'Patient search' (with a magnifying glass icon), 'LEARN' (with a graduation cap icon), and 'James Smith'. Below the navigation is a dark blue header bar with the text 'Create a new patient survey' and a 'CREATE A SURVEY' button. The main content area is titled 'Survey Queue'. It features a search bar with dropdowns for 'Location' (set to 'All') and 'Surveys' (set to 'All'), a 'Search patients' input field, and a magnifying glass icon. A table lists six patients with surveys due today. The table columns are 'Day Due', 'Patient Name', and 'Survey Script'. The data is as follows:

Day Due	Patient Name	Survey Script
Today	Victoria Walker	Regency Rehab East Annual Survey
Today	Lois Matthew	Regency Rehab East Annual Survey
Today	Russell Sandstrom	Regency Rehab West Annual Survey
Today	Bobbie Cox	Regency Rehab East Annual Survey
Today	Ricardo Sawyer	Regency Rehab West Annual Survey
Today	Sally Thurman	Regency Rehab East Annual Survey

On the right side of the table, there is a purple circular icon with a white speech bubble symbol. The overall interface is clean and modern, with a white background and blue and purple accents.

## 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

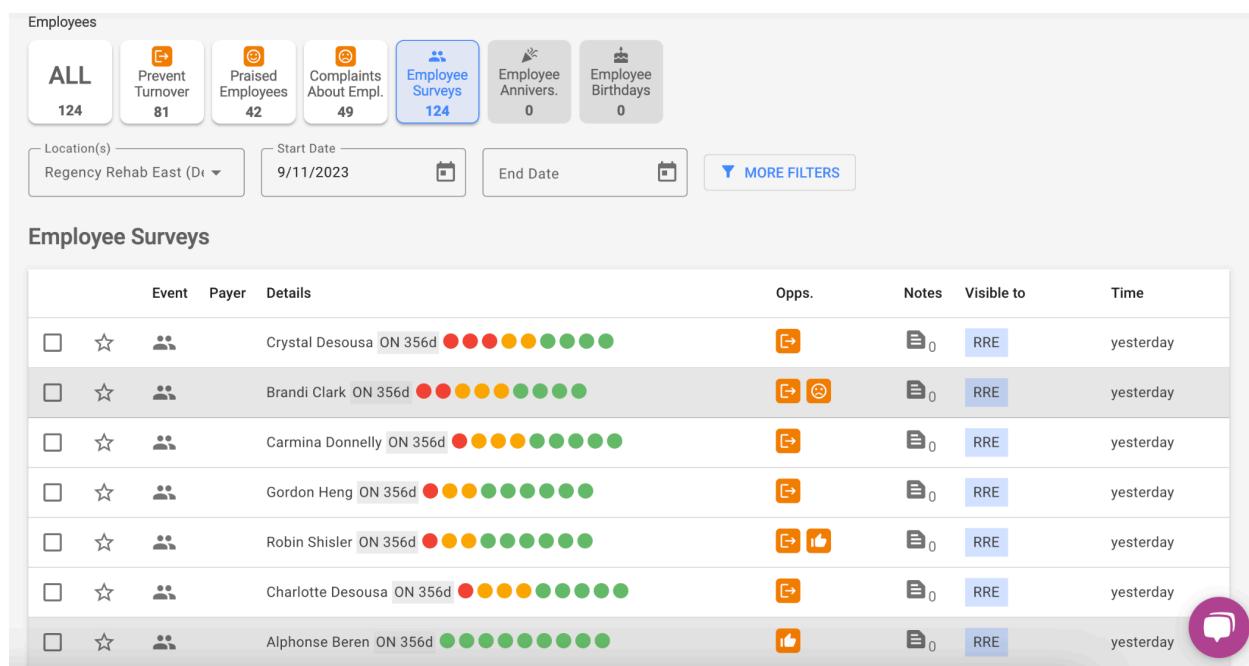
## Discover How to Keep Your Employees Engaged and Thrilled With Their Jobs

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.



The screenshot shows the Cortex Employee Surveys dashboard. At the top, there are several filters: 'ALL 124', 'Prevent Turnover 81', 'Praised Employees 42', 'Complaints About Empl. 49', 'Employee Surveys 124' (which is highlighted in blue), 'Employee Annivers. 0', and 'Employee Birthdays 0'. Below these are dropdowns for 'Location(s)' (Regency Rehab East) and date ranges ('Start Date: 9/11/2023', 'End Date:'). A 'MORE FILTERS' button is also present. The main section is titled 'Employee Surveys' and displays a table of survey responses. The table has columns: 'Event', 'Payer', 'Details', 'Opps.', 'Notes', 'Visible to', and 'Time'. Each row represents a survey response from an employee. The 'Details' column shows the employee's name, ID, and a series of colored circles (red, yellow, green) representing survey results. The 'Opps.' column contains icons for 'Edit', 'Delete', and 'Note'. The 'Visible to' column shows 'RRE' (Regency Rehab East). The 'Time' column shows 'yesterday' for all entries. A purple speech bubble icon is in the bottom right corner of the table area.

Event	Payer	Details	Opps.	Notes	Visible to	Time	
<input type="checkbox"/>	★	Crystal Desousa ON 356d				RRE	yesterday
<input type="checkbox"/>	★	Brandi Clark ON 356d				RRE	yesterday
<input type="checkbox"/>	★	Carmina Donnelly ON 356d				RRE	yesterday
<input type="checkbox"/>	★	Gordon Heng ON 356d				RRE	yesterday
<input type="checkbox"/>	★	Robin Shisler ON 356d				RRE	yesterday
<input type="checkbox"/>	★	Charlotte Desousa ON 356d				RRE	yesterday
<input type="checkbox"/>	★	Alphonse Beren ON 356d				RRE	yesterday

## 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.

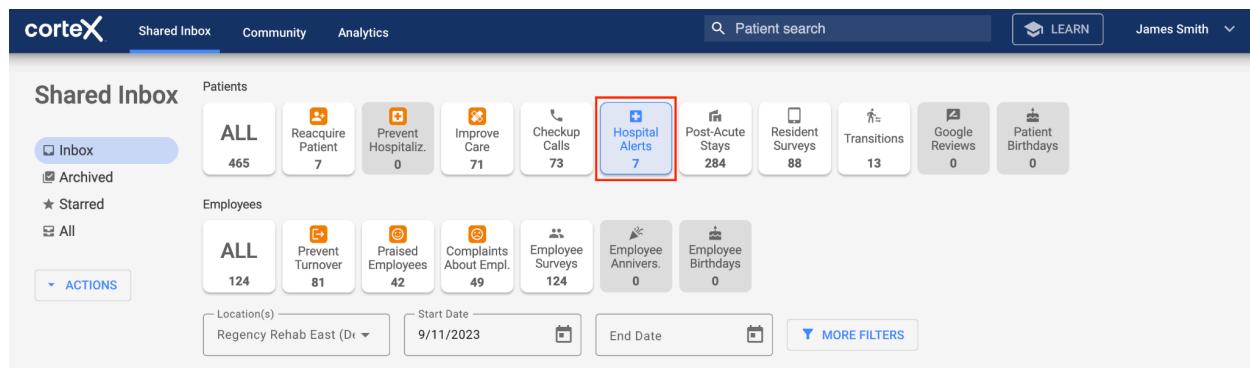
## Employee Roster

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:

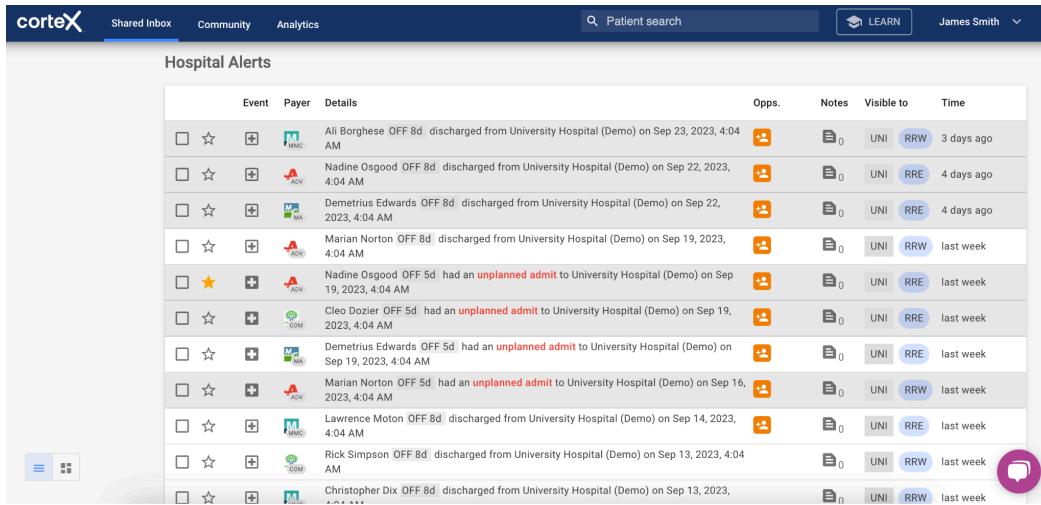


The screenshot shows the Cortex Shared Inbox dashboard. At the top, there are tabs for 'Shared Inbox' (which is selected), 'Community', and 'Analytics'. To the right of the tabs is a 'Patient search' bar and a 'LEARN' button. The main area is titled 'Shared Inbox' and contains several sections: 'Patients' and 'Employees'. The 'Patients' section includes a 'Hospital Alerts' tile, which is highlighted with a red box. The 'Employees' section includes a 'Employee Birthdays' tile. Below these sections are filters for 'Location(s)', 'Start Date' (set to 9/11/2023), 'End Date', and a 'MORE FILTERS' button. On the left side of the main area, there is a sidebar with buttons for 'Inbox' (selected), 'Archived', 'Starred', and 'All', and a 'CTIONS' button.

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

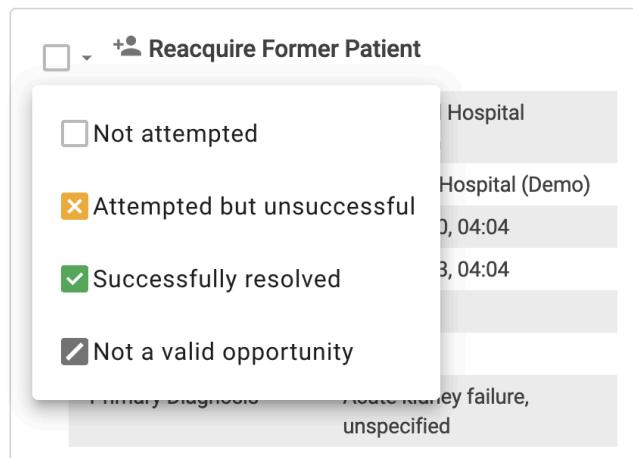
Reviewing on the hospital alerts list page:



Event	Payer	Details	Opps.	Notes	Visible to	Time
Ali Borghese	MMC	OFF 8d discharged from University Hospital (Demo) on Sep 23, 2023, 4:04 AM	1	0	UNI RRW	3 days ago
Nadine Osgood	ADV	OFF 8d discharged from University Hospital (Demo) on Sep 22, 2023, 4:04 AM	1	0	UNI RRE	4 days ago
Demetrius Edwards	MMC	OFF 8d discharged from University Hospital (Demo) on Sep 22, 2023, 4:04 AM	1	0	UNI RRE	4 days ago
Marian Norton	ADV	OFF 8d discharged from University Hospital (Demo) on Sep 19, 2023, 4:04 AM	1	0	UNI RRW	last week
Nadine Osgood	ADV	OFF 5d had an <b>unplanned admit</b> to University Hospital (Demo) on Sep 19, 2023, 4:04 AM	1	0	UNI RRE	last week
Cleo Dozier	COM	OFF 5d had an <b>unplanned admit</b> to University Hospital (Demo) on Sep 19, 2023, 4:04 AM	1	0	UNI RRE	last week
Demetrius Edwards	MMC	OFF 5d had an <b>unplanned admit</b> to University Hospital (Demo) on Sep 19, 2023, 4:04 AM	1	0	UNI RRE	last week
Marian Norton	ADV	OFF 5d had an <b>unplanned admit</b> to University Hospital (Demo) on Sep 16, 2023, 4:04 AM	1	0	UNI RRW	last week
Lawrence Moton	MMC	OFF 8d discharged from University Hospital (Demo) on Sep 14, 2023, 4:04 AM	1	0	UNI RRE	last week
Rick Simpson	MMC	OFF 8d discharged from University Hospital (Demo) on Sep 13, 2023, 4:04 AM	1	0	UNI RRW	last week
Christopher Dix	MMC	OFF 8d discharged from University Hospital (Demo) on Sep 13, 2023, 4:04 AM	1	0	UNI RRW	last week

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.



☐ + Reacquire Former Patient

Not attempted

Attempted but unsuccessful

Successfully resolved

Not a valid opportunity

Hospital

Hospital (Demo)

19, 2023, 4:04:04

Primary Diagnosis

Acute kidney failure, unspecified

# Hospital Alerts Best Practices

## Champion

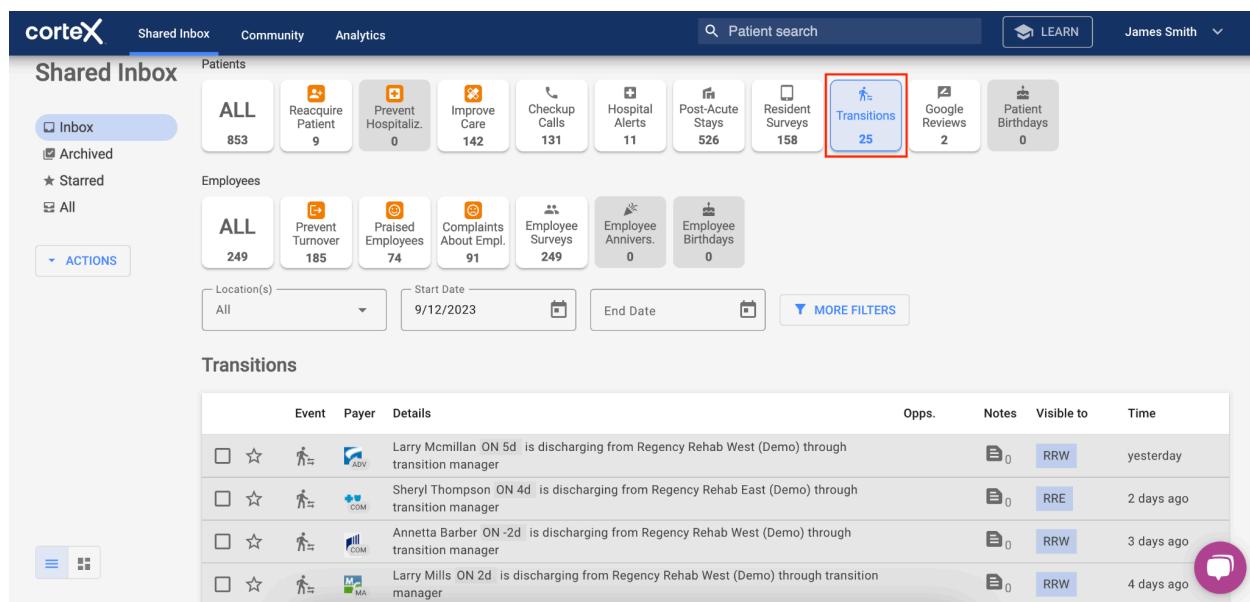
We recommend having one designated Cortex Champion in your office to review and respond to Hospital Alerts (this may be the same person as the Champion reviewing CheckUp Calls). This employee should review all hospital alerts (ED visits and unplanned hospital admissions) as quickly as possible. This 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.

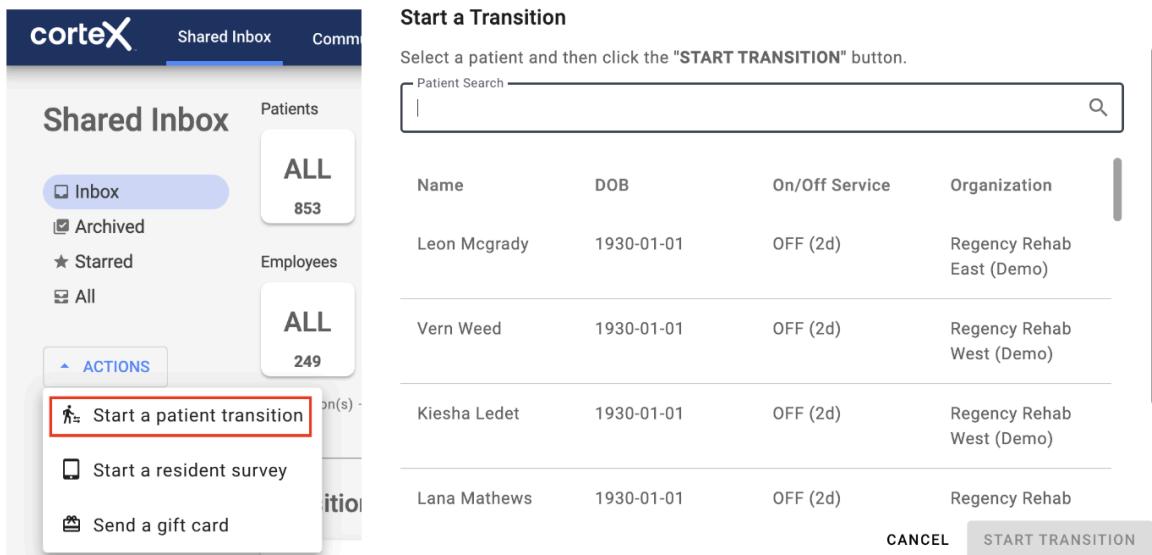


The screenshot shows the Cortex Shared Inbox dashboard. At the top, there are several quick access links: 'Inbox' (853), 'Reacquire Patient' (9), 'Prevent Hospitaliz.' (0), 'Improve Care' (142), 'Checkup Calls' (131), 'Hospital Alerts' (11), 'Post-Acute Stays' (526), 'Resident Surveys' (158), 'Transitions' (25), 'Google Reviews' (2), and 'Patient Birthdays' (0). The 'Transitions' link is highlighted with a red box. Below these links are sections for 'Patients' and 'Employees', each with various sub-links. The 'Transitions' section is expanded, showing a table of recent transitions. The table has columns for 'Event', 'Payer', 'Details', 'Opps.', 'Notes', 'Visible to', and 'Time'. The details column contains descriptions of the transitions, such as 'Larry Mcmillan ON 5d is discharging from Regency Rehab West (Demo) through transition manager' and 'Sheryl Thompson ON 4d is discharging from Regency Rehab East (Demo) through transition manager'. The 'Visible to' column shows 'RRW' and 'RRE' for different patients, and the 'Time' column shows 'yesterday', '2 days ago', '3 days ago', and '4 days ago'. A purple speech bubble icon is in the bottom right corner of the transitions table.

Event	Payer	Details	Opps.	Notes	Visible to	Time
<input type="checkbox"/>	☆	Larry Mcmillan ON 5d is discharging from Regency Rehab West (Demo) through transition manager		<input type="checkbox"/> 0	RRW	yesterday
<input type="checkbox"/>	☆	Sheryl Thompson ON 4d is discharging from Regency Rehab East (Demo) through transition manager		<input type="checkbox"/> 0	RRE	2 days ago
<input type="checkbox"/>	☆	Annetta Barber ON -2d is discharging from Regency Rehab West (Demo) through transition manager		<input type="checkbox"/> 0	RRW	3 days ago
<input type="checkbox"/>	☆	Larry Mills ON 2d is discharging from Regency Rehab West (Demo) through transition manager		<input type="checkbox"/> 0	RRW	4 days ago

## Transitions

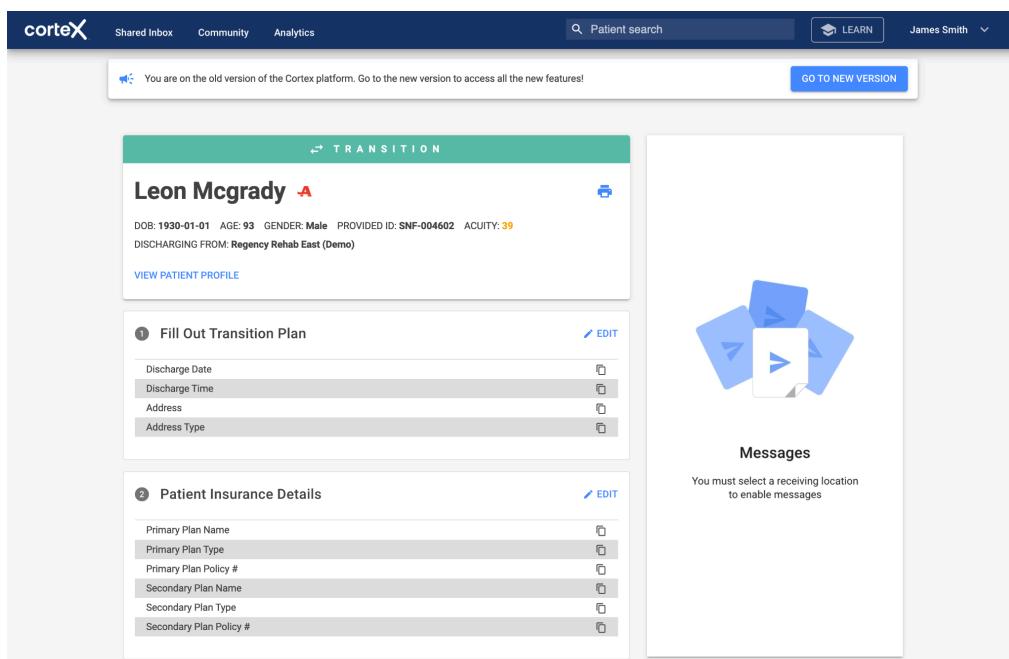
As a discharge coordinator at an SNF, if you would like to start a new transition, click "Actions" on the left hand side of the screen and then "Start a patient transition." Search for and select the name of the patient you are initiating a Transition. Add details and documents appropriate to share for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



The screenshot shows the Cortex Shared Inbox interface. On the left, there are filters for 'Inbox' (selected), 'Archived', 'Starred', and 'All'. Below these are buttons for 'Start a patient transition', 'Start a resident survey', and 'Send a gift card'. The 'Start a patient transition' button is highlighted with a red box. On the right, a table lists patients with columns for Name, DOB, On/Off Service, and Organization. The table includes four rows of data: Leon Mcgrady (1930-01-01, OFF (2d), Regency Rehab East (Demo)), Vern Weed (1930-01-01, OFF (2d), Regency Rehab West (Demo)), Kiesha Ledet (1930-01-01, OFF (2d), Regency Rehab West (Demo)), and Lana Mathews (1930-01-01, OFF (2d), Regency Rehab). At the bottom are 'CANCEL' and 'START TRANSITION' buttons.

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.



The screenshot shows the Cortex platform. At the top, there is a message: "You are on the old version of the Cortex platform. Go to the new version to access all the new features!" with a "GO TO NEW VERSION" button. The main area is titled "TRANSITION" and shows patient details for "Leon Mcgrady". Below the details are sections for "Fill Out Transition Plan" and "Patient Insurance Details", each with an "EDIT" button. To the right is a sidebar titled "Messages" with a note: "You must select a receiving location to enable messages".

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.

The Cortex Clinical dashboard is a comprehensive interface for healthcare analytics. It features a top navigation bar with links to 'Shared Inbox', 'Community', 'Analytics', 'Patient search' (with a search bar), 'LEARN' (with a graduation cap icon), and a user profile for 'James Smith'. The main content area is divided into several sections: 'Clinical' (selected), 'Checkup Calls: Department Report' (with a bar chart showing department performance), 'Checkup Calls: Location Comparison' (with a bar chart comparing locations), 'Checkup Calls: Question Comparison' (with a donut chart showing question results), 'Prevented Readmission Report' (with a bar chart showing preventions), 'Readmission Analytics' (with a line chart and bar chart showing readmission trends), 'Transitions: NTUC' (with a bar chart showing patient transitions), 'Hospitalization Predictor' (with a table of patient risk scores), and 'Patient Risk Changes' (with a table of risk score changes). Each section includes a star icon in the bottom right corner.

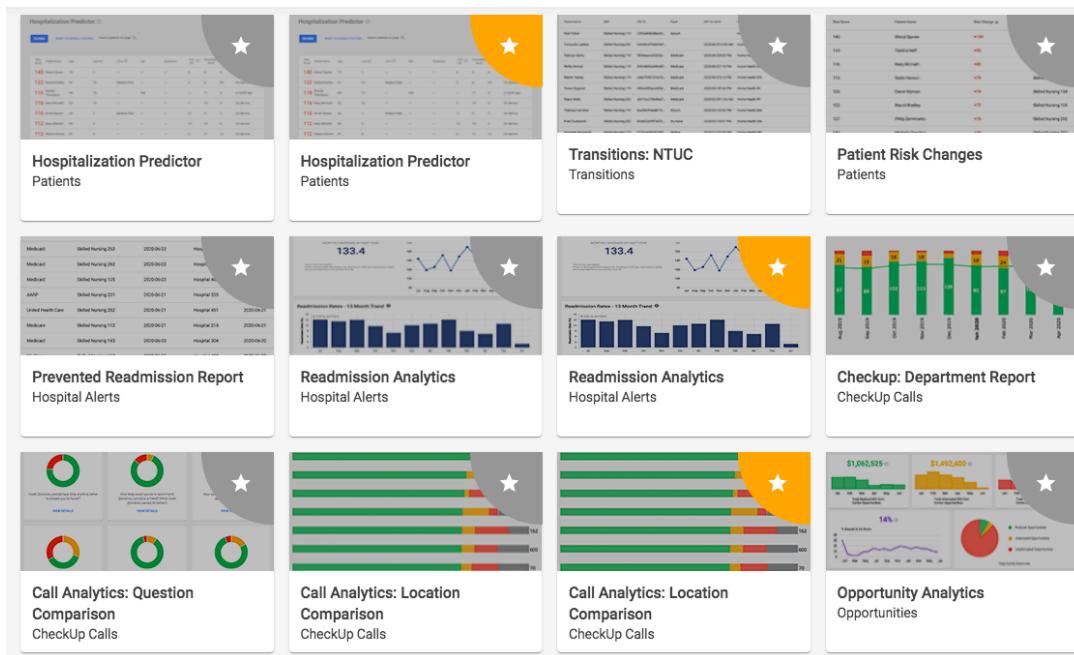
## Preferences

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](mailto: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."