**CSI AlayaCare Portal FAQ’s**

**I am not finding my patient accounts on my client list**

Be sure your filters are capturing the status of all options available you want to view

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**Why am I seeing duplicate patient accounts?**

If you are part of an agency that has multiple locations, be sure you are under the correct location when submitting and new referral. If a new referral is submitted under the Parent Account, this will create duplicate account once the service lines are processed.

Be sure you are choosing + service when processing service lines for an already active account. If +client & +service option is chosen it will create duplicate accounts.

**I am not able to discharge a case with a date prior to my go live date**. Once your agency goes live in the AlayaCare portal and active cases are transferred over, and you need to discharge a case. You are not able to use a date prior to your go live date. You can use the current date and include the actual discharge date in the note and in the Mail Message you send to CSI.

**I am uploading documents under the attachment’s sections in the client account, but CSI is not receiving them.** Remember you must submit a *form* to get anything needed to CSI. To send documents to CSI. In the client chart, go to client forms, click **+ client form,** select the form **Mail Message**, complete the form and upload documents, then click **submit form**.

**I am adding a new client, but no form is showing for me to populate the new referral information.** You must choose **CSI New Referral Request** under Intake form when entering a new client in order for the form to appear to populate.





**I am not seeing a patient I submitted in the old portal on the client list in AlayaCare.**

Check your authorization service lines under the Marketplace referrals screen to confirm if they need processed. If you submitted a referral in the old portal and did not receive auth before your GO LIVE date you must process those services lines to create a patient account. In this situation you will need to click **+New Client & Service** for the first service line in order to create the account, all subsequent service lines you **only** need to click **+ New Service**. (if you continue to click +New Client & Service for more than one service line, this will create duplicate accounts).

**I submitted a new referral, but my patient is a non-admit and I need to cancel**.

Notify CSI via a Mail Message that the patient is a non-admit and the referral can be cancelled. In AlayaCare, change the status of the case from pending to discharged, you can add in your note patient is non admit for your records. Under Marketplace Referrals mark the service lines as processed under the action drop down menu. This will not create an account or add a service line but will show a processed status.

