Carina OR Case Manager Reference Guide

Carewell| Updated Dec. 2, 2025

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Purpose

The purpose of this presentation is to orient case managers to Carina and how to invite consumers to the platform:

This guide covers the following:

- An overview of the Carewell Registry and Retention Project
- An overview of Carina and platform roles
- The case manager role and how to create an account
- The consumer and provider journeys
- What to do when additional help is needed
- How to report inappropriate user behavior
- General security guidelines

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Section 1: Carewell Registry and Retention Project

Carewell
SEIU503

What is the purpose of this Project?

- Reduce consumer frustration and challenges in finding and connecting with care providers - by making available care providers more accessible and their availability current (through real-time automated processes that help ensure provider availability and consumer job postings are kept cu*rrent).*
- Strengthen workforce retention and sustainability by creating a pipeline for career opportunities and pathway for credential advancements - understanding that the strength and viability of the workforce directly impacts consumer's ability to find the care they need.

Primary Objectives

- Develop a state-of-the-art and user-friendly homecare matching platform to meet the changing and demanding needs of consumers, care providers, and case managers.*
- Serve as the primary method for connecting available homecare and personal support workers with consumers across Oregon.
- Enable consumers to connect with homecare and personal support workers that are the right fit, whether on an ongoing, emergency, or respite basis.

*Specifically pertaining to the OPI and Medicaid programs

How is Carina different?

- User-friendly and competitive with alternate platforms
- Always free for consumers, providers, and case managers
- Enables verified Medicaid and Oregon Project Independence consumers to easily connect with verified HCWs, PCAs and PSWs
- Enables consumer employers to easily post jobs and communicate with potential providers securely and efficiently
- Enables HCWs, PSWs, and PCAs to make themselves available for work and express interest in potential employment opportunities
- Accessible in English, Spanish and Russian with additional languages planned for the future
- Supports screen reader compatibility, and carries other ADA-compliant features
- Available on multiple technology platforms – mobile devices, tablets, and desktop computers
- Fresh Data: Real-time automated processes that help ensure provider availability and consumer job postings are kept current

Section 2: About Carina

Carina.org

About Carina

Carina is a nonprofit technology organization that provides a safe, easy-to-use, care-matching service for the purpose of connecting families and individuals who need care with care professionals looking for good jobs and steady work.

Carina Platform Roles

Platform Roles

While anyone can visit Carina to explore and learn more about our platform, **not everyone can search for care providers or find work**. This is reserved solely for consumers, providers, and certain case managers who support individuals and families in finding care.

Consumers, providers, and case managers participating in programs served by Carina are assigned what we call a '**platform role**' – each role has different capabilities.

Carina Platform Roles: Consumers and Providers

Carina Roles: Consumers and Providers

Carina was designed specifically to help consumers and providers find one another and connect – they are at the heart of our platform. Below is a table describing the features and functionality of their roles in Carina.

Carina Role	Find consumers/ Save job	Find providers/ Save providers	Create profile	Post job	Send message	Configure settings
Providers Authorized care providers who deliver in-home and community-based services for consumers and who are seeking jobs	✓	✓	✓		✓	✓
Consumers Eligible participants of Oregon's Medicaid program who are seeking caregivers		✓		✓	✓	✓

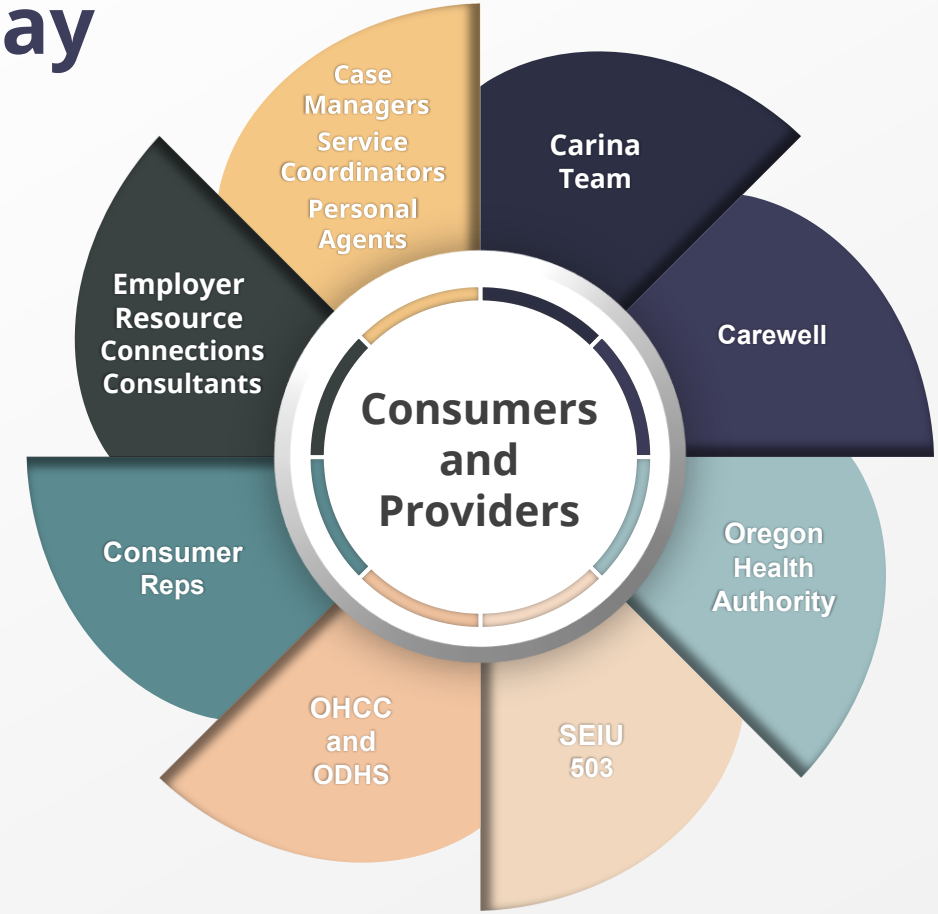
Carina Platform Roles: Case Managers

Includes case managers, personal agents, service coordinators, and other related positions

Case Managers Play an Essential Role

Central to Carina's inclusive and collaborative partnership approach lies a multitude of diverse stakeholders dedicated to helping individuals and families gain access to the vital care they need.

This means YOU and your organization!



Carina Roles: Case Manager Access Levels

Because of the significant part you play in the service delivery system, Carina has designed a platform role specifically for those who facilitate or assist people in finding care. We call this the Case Manager role. Below is a table describing the features and functionality of this role:

Carina Role	Find consumers/ Save job	Find providers/ Save providers	Create profile	Post job	Send message	Configure settings
Level 1 – Case Manager Access Default level of access for those who support consumers.	✓	✓				
Level 2 – Case Manager Access Access is provided on an **as-needed basis** to those who actively help a consumer find a care provider.	✓	✓		✓	✓	

What You Can Do

Given the significant part you play in the service delivery system and because we all want consumers and families to find what they need, we are asking that you:

- **Become familiar** with Carina
- **Introduce** consumers and family members to Carina
- **Refer** them to Carina to find the care they need
- **Use** Carina when needed to help consumers and supports find care
- **Share your feedback** along the way so we can work together effectively and ensure people are getting what they need

Section 3:
Case Manager Access

Includes case managers, personal agents, and service coordinators

How to Access Carina

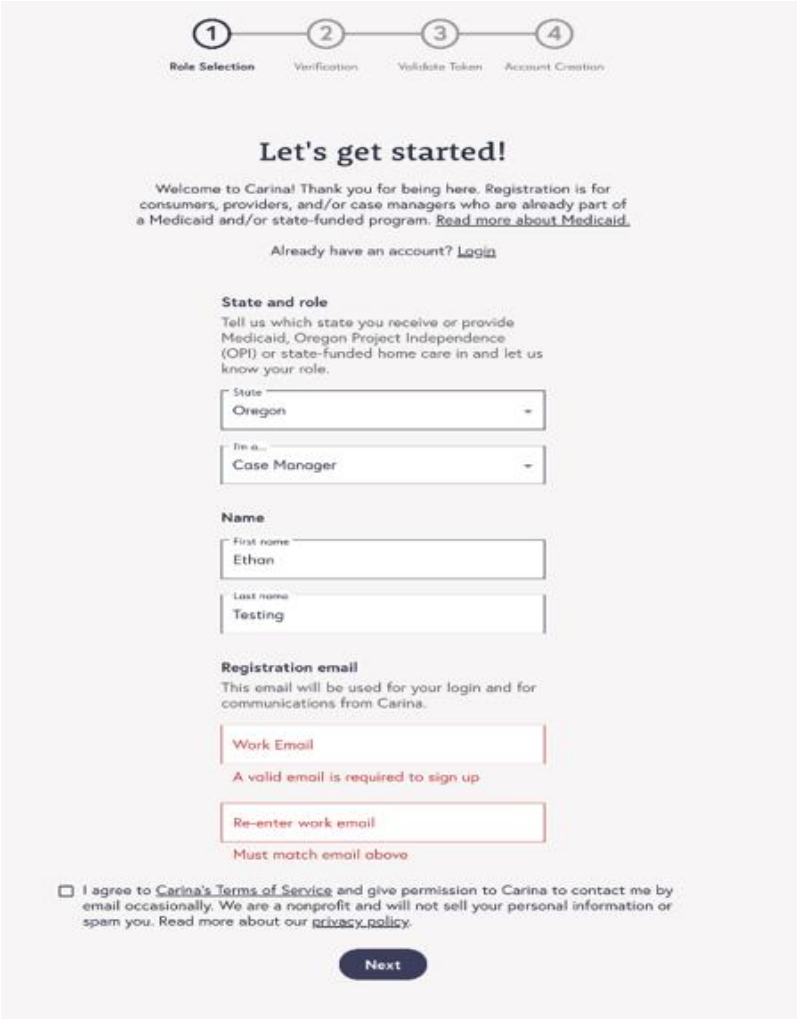
Before case managers are granted access to Carina, **you must complete the following:**

1) Attend a Carina orientation session (like this one).
2) After orientation, we will share a registration link with you.
3) You can click on this link and begin the registration process – the *Let's Get Started* and *Verification* steps.
4) After the *Verification* step, an email is sent to your work e-address containing a link – please click on this link and create a password.
5) Once complete, you will proceed to the onboarding step which includes agreeing to Carina's community guidelines. Please read through and accept these guidelines.
6) After this final step, you will have access to your new Carina account

Registration

Let’s get started!

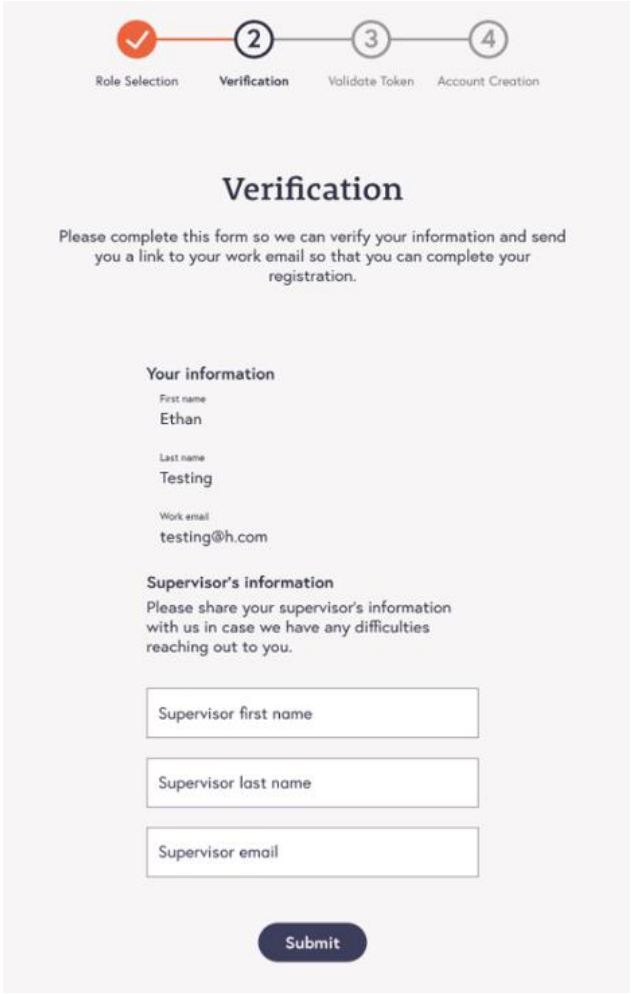
- After clicking on the link, you will be taken to the Carina case manager account registration page
- Select your state and role
- Enter your first and last names
- Complete this step by entering and re-entering your work email
- Click “Next”



Registration

Verification

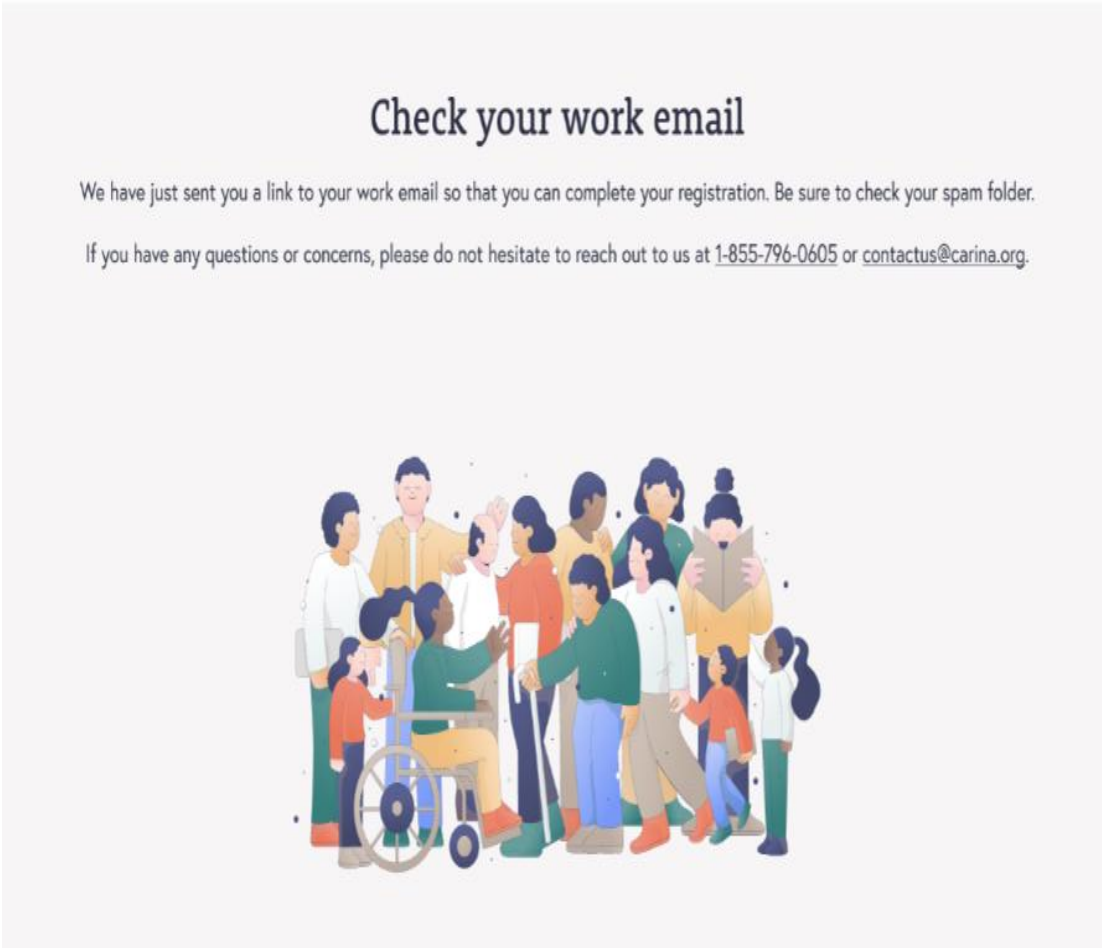
- On the next page, your name and email address are pre-populated
- Please enter your supervisor’s first and last names and work email address
- Click “Submit”



Registration

Check your work email

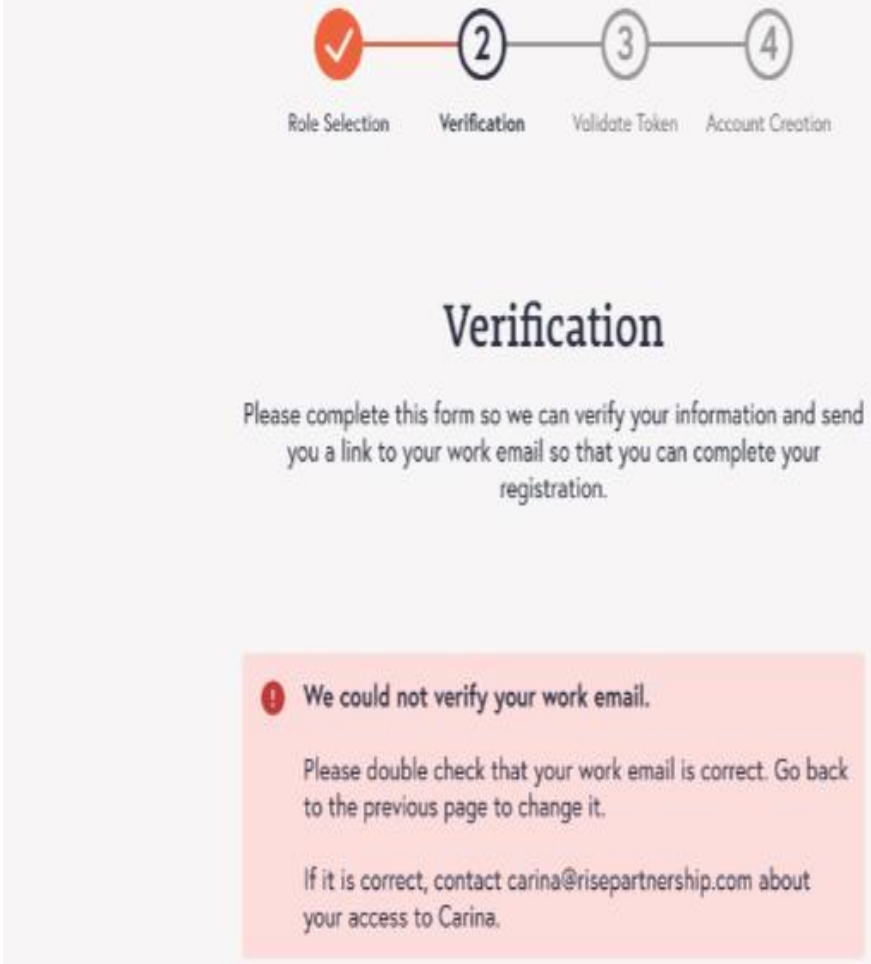
If your work email domain is recognized, you will receive an email with a link to complete the registration process.



Registration

Invalid domain message

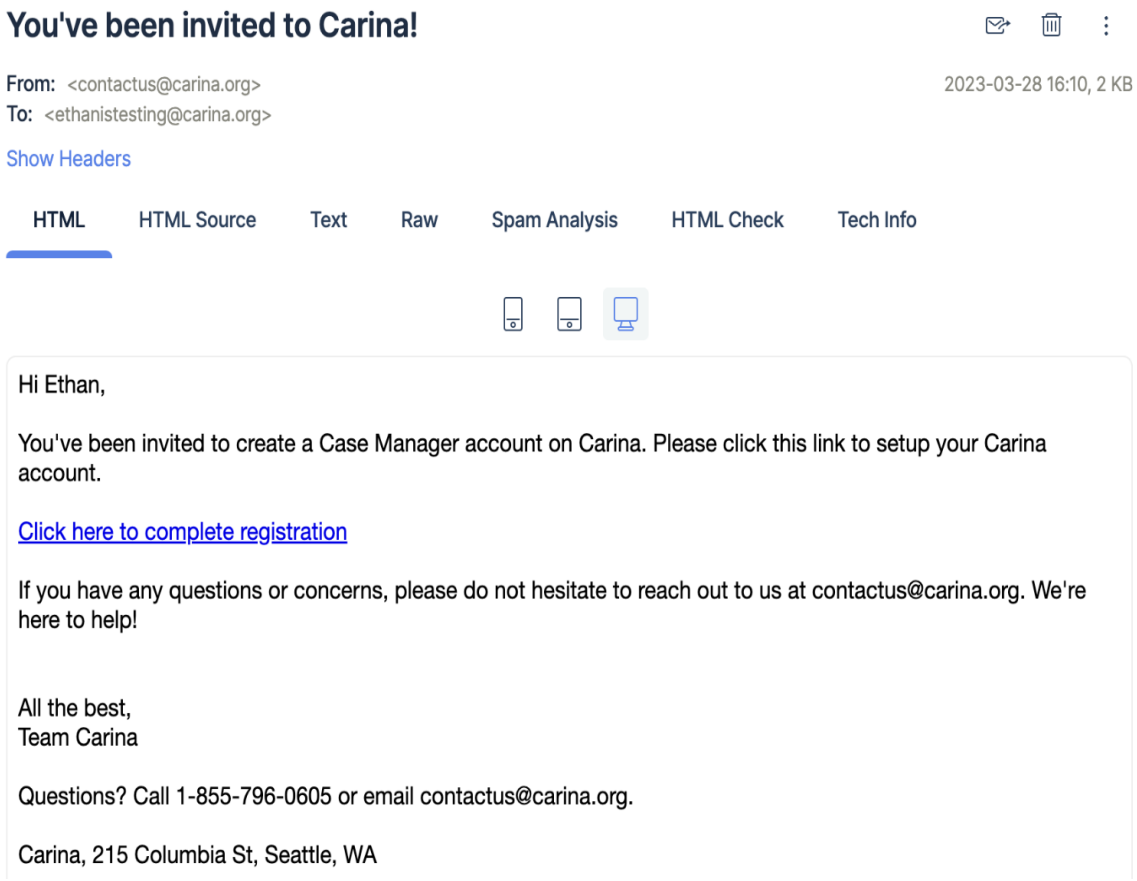
- If your work email domain is NOT recognized, a message will display asking you to double-check it on the previous page.
- If you check and your email is correct, please contact carina@risepartnership.com for additional assistance.



Registration

Verification Email

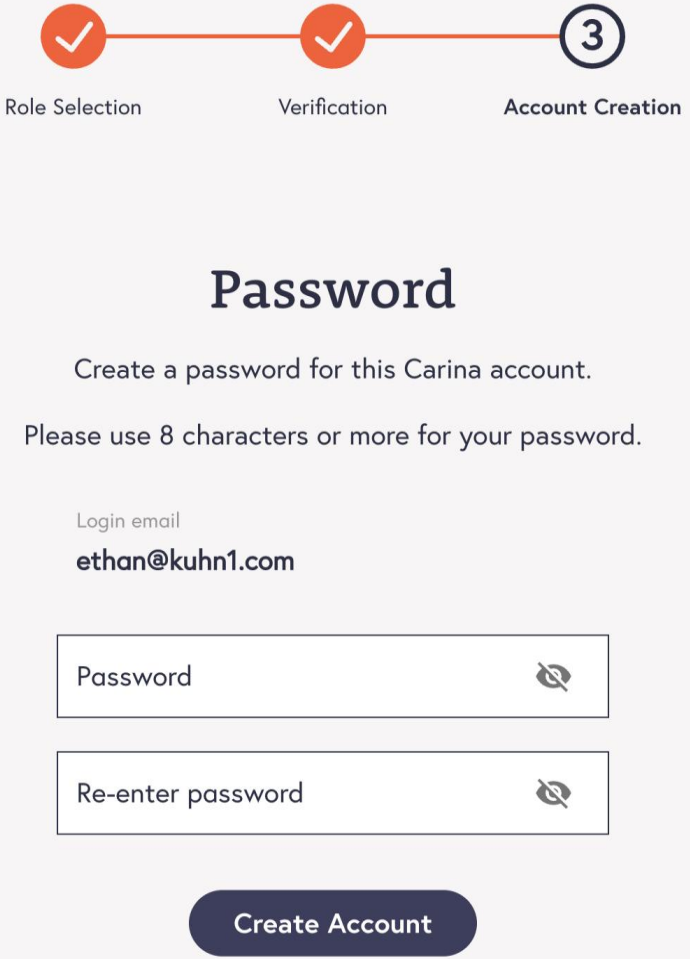
- Click on the link in the email to complete the account registration process.
- If you have questions or run into an issue, please call or email User Support.



Registration

Set Password

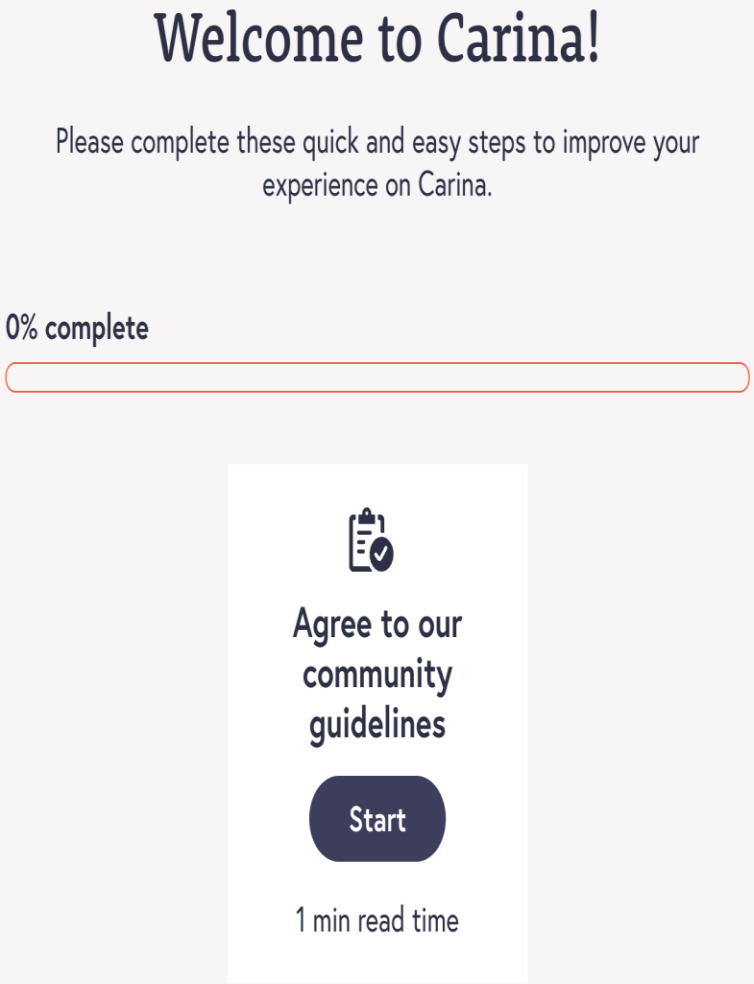
- The link in the email will take you to the next step in the registration process
- Please enter and re-enter your password
- Click on “Create Account”



Onboarding

Almost Done!

- You now must complete the onboarding process before your account is set up.
- For case managers this means agreeing to Carina's community guidelines – click the "Start" button to proceed.



Onboarding

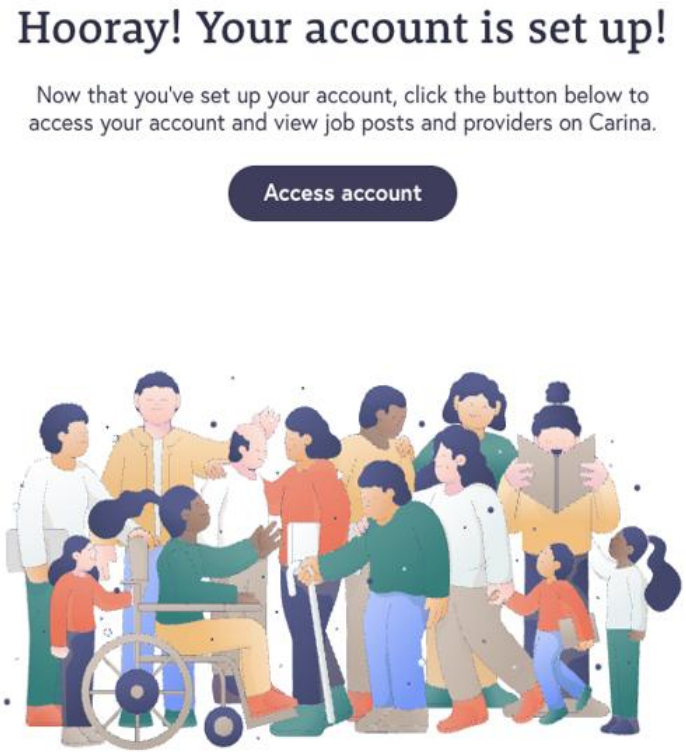
Community Guidelines

Please go through each of the Community Guidelines then click “I agree”.

Account Confirmation

All set!

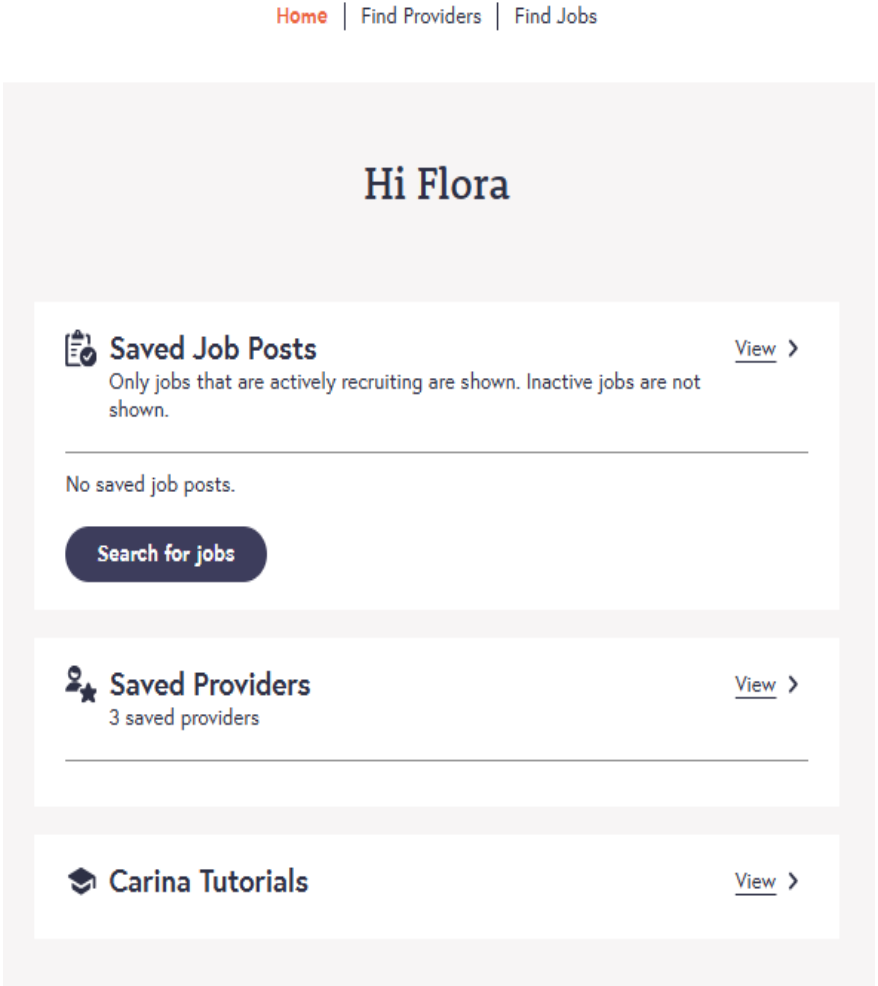
- Your Carina account is now set up.
- You can choose to proceed to your account home page by clicking on “Access account”



Your Carina Account

Home page – Level 1

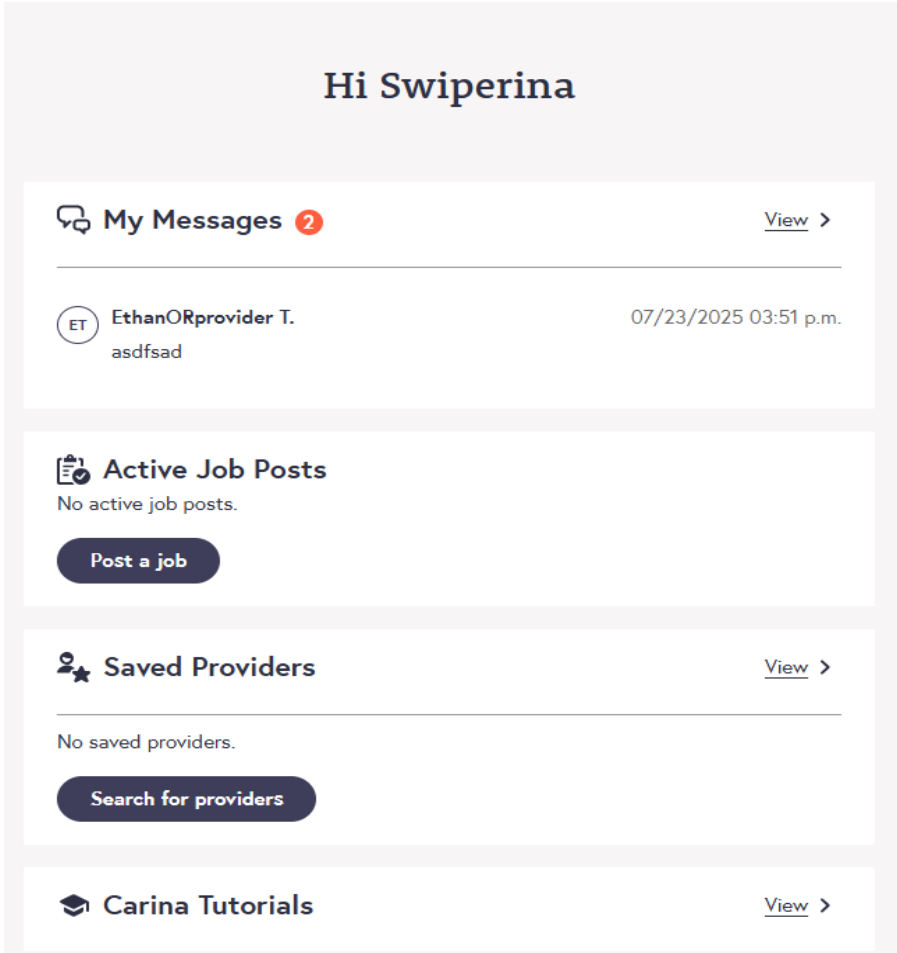
- Your Carina account home page allows you to search and save providers and search and save consumers.



Your Carina Account

Home page – Level 2

- If you have Level 2 case manager access, you will also be able to message providers and post jobs on behalf of consumers.



How to Request Level 2 Access

- In limited cases where a case manager may need to perform some functions on behalf of the consumers (message and post jobs), **a higher level of access to the Carina platform can be requested** after the initial registration has been completed – this is called Case Manager Level 2.
- To request this level of case manager access, **your supervisor must send an email to Carina@RisePartnership.com** with the names and work email addresses of the individuals needing to be upgraded from Level 1 to Level 2.

Case Manager Access Level 1
In Detail

Case Manager-Level 1

Basic steps for Level 1 Case Managers to gain access and use the Carina Platform:

- Attend an orientation session where a registration link will be shared
- Click on the link and complete the registration and onboarding process – this includes an email verification step

Once the account is set up, **there are 2 things that Case Managers with Level 1 access can do** on Carina:

- Search, view, and save consumer job posts
- Search, view, and save provider profiles

Carina Role	Find consumers/ Save job	Find providers/ Save providers	Create profile	Post or Delete job	Send message	Configure settings
Level 1 - Default level of access for those who support consumers.	✓	✓				

1. View Jobs

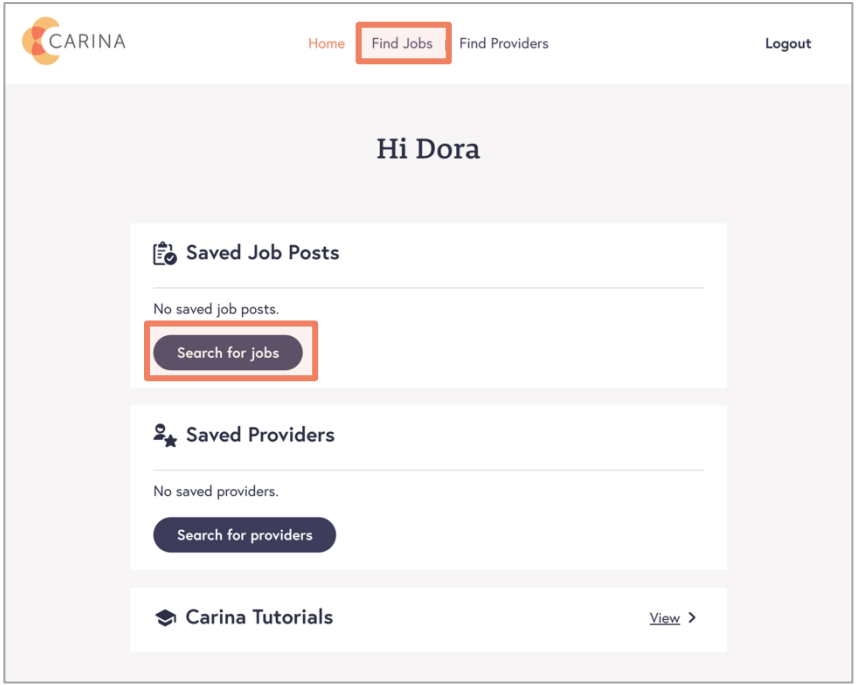
Level 1 Case Managers have view-only access – they can view consumer job posts on Carina.

Click “Find Jobs”

for Level 1 Case Managers

Once a Level 1 Case Manager completes onboarding, they will land in their account home page. This page shows a list of saved providers and job posts.

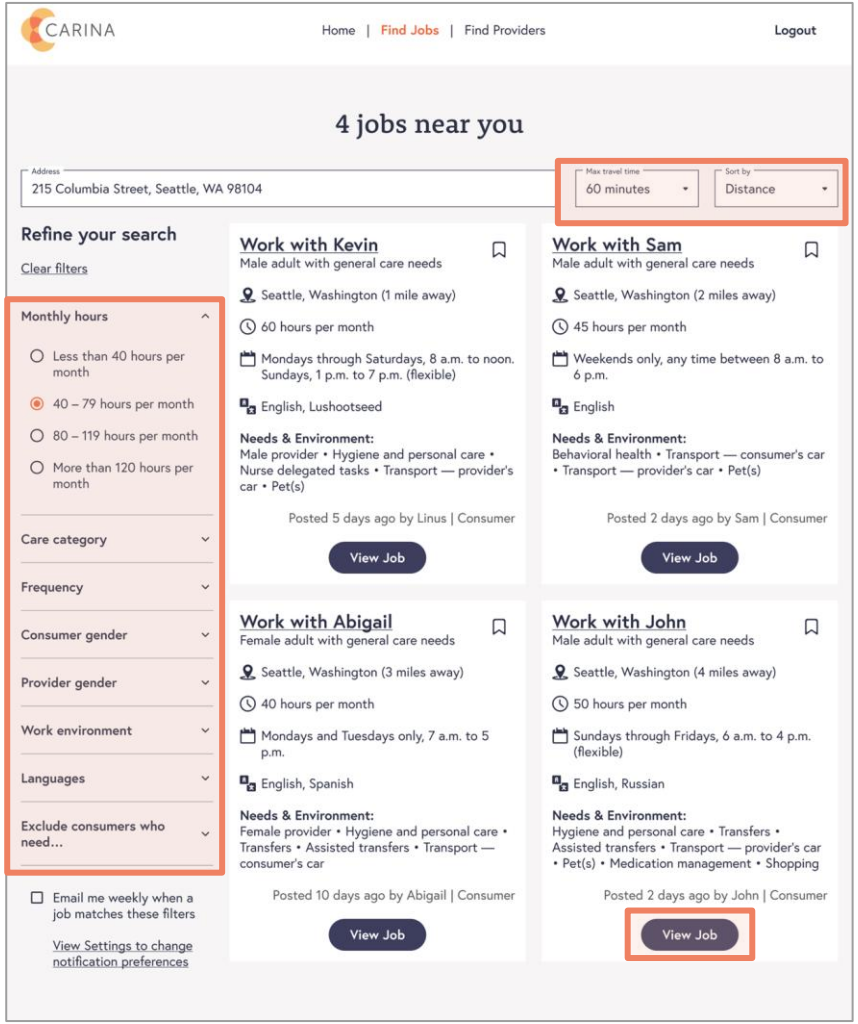
- From the account home page, click **“Search for jobs”** or **“Find Jobs”** at the top of the page.



Filter, sort, and search

for Level 1 Case Managers

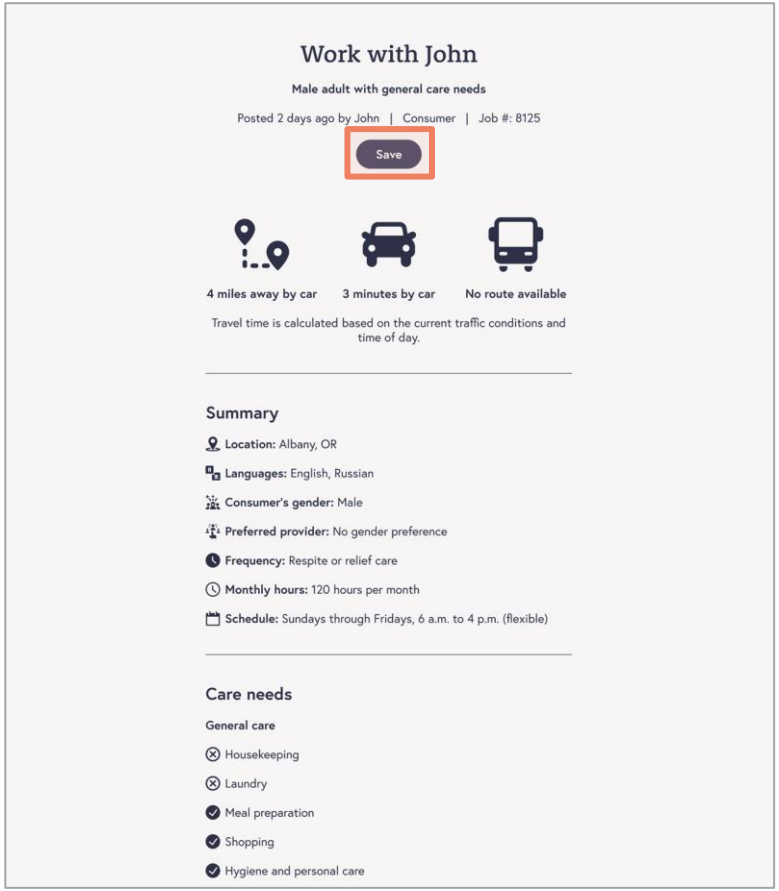
1. Use the drop down menus at the top to **sort** providers by a specific criteria.
2. Use the **filters** on the left to see only job posts that meet a certain criteria.
3. Next to the filters, the user will see previews of job posts that meet the user's criteria.
4. To view more information about a specific job post, click **"View Job"**.



View job post

for Level 1 Case Managers

1. Review the job post.
2. If the case worker would like to save this job post for future reference, they can click **“Save”.** This will bookmark the job post and can be accessed again under “Saved Job Posts” in the account home page.

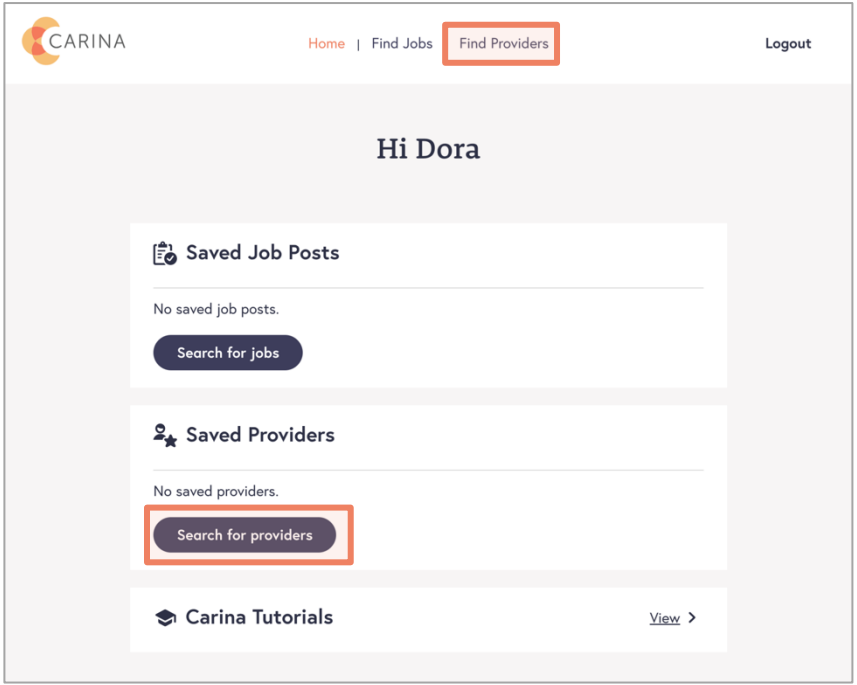


2. View Providers

Level 1 Case Managers are also able to view provider profiles on Carina.

Click “Search for Providers”

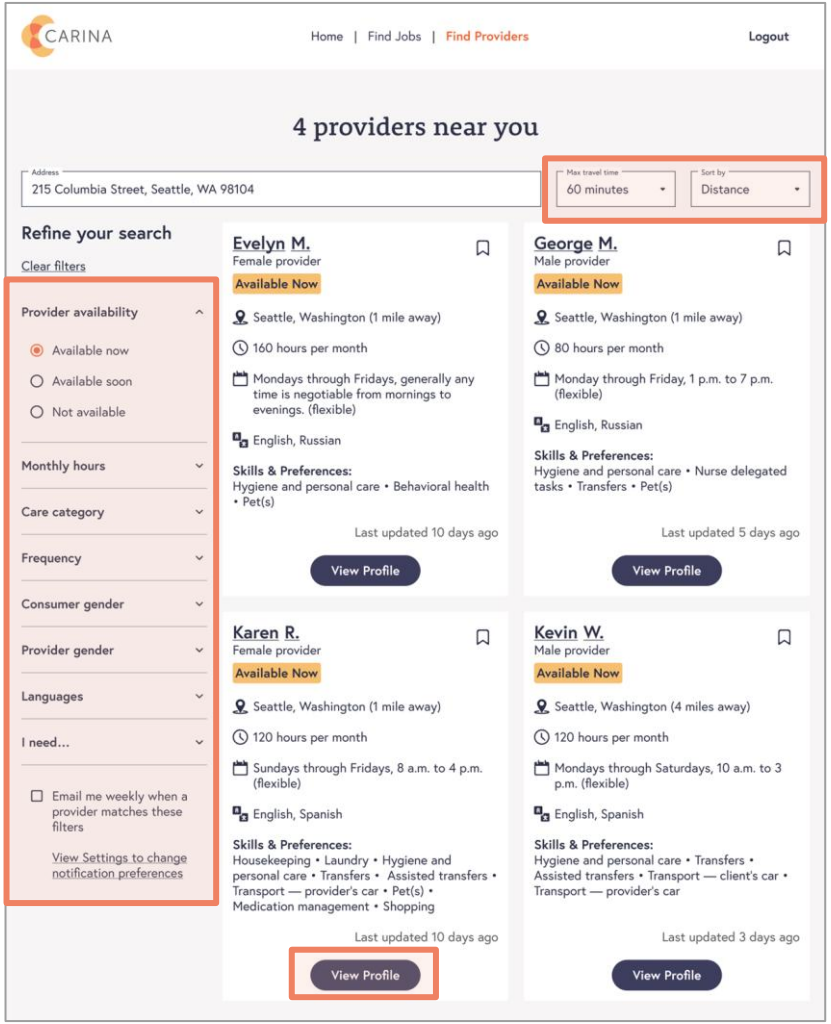
From the account home page, click “Search for providers” or “Find Providers” at the top of the page.



Filter, sort, and search

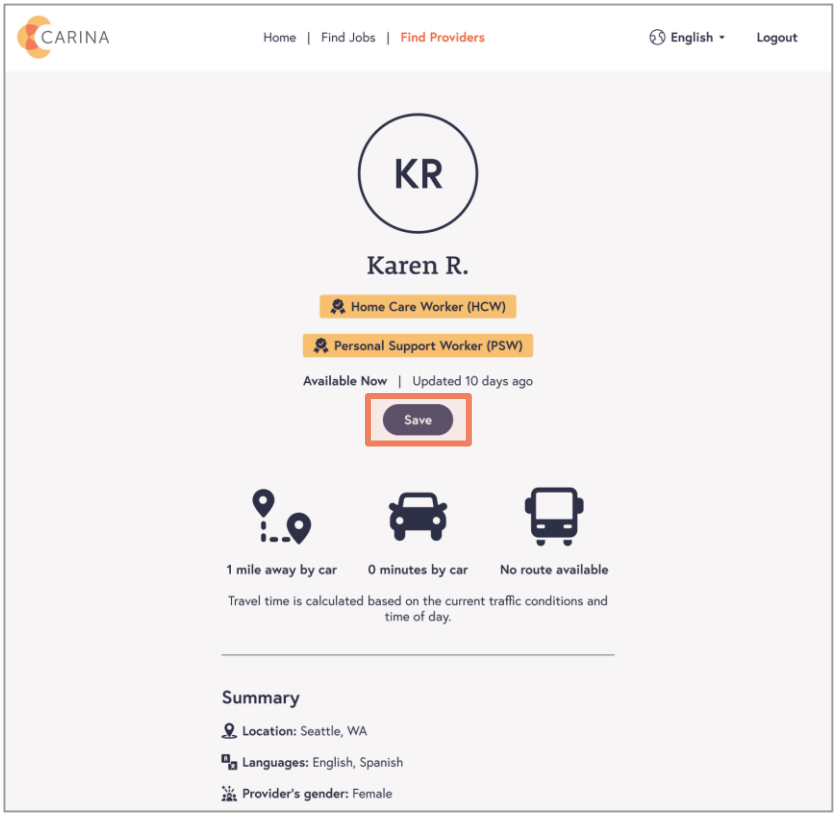
to find care providers

1. Use the drop down menus at the top to **sort** providers by a specific criteria.
2. Use the **filters** on the left to see only providers that meet a certain criteria.
3. Next to the filters, the user will see previews of provider profiles that meet the user's criteria.
4. To view more information about a specific provider, click **"View Profile"**.



View Provider Profile

1. Review the provider's profile.
2. If the user would like to save this profile for future reference, they can click **"Save".** This will bookmark the provider profile, which can be accessed again under "Saved Providers" in the account home page.



Case Manager Access Level 2
In Detail

Case Managers-Level 2

If a Case Manager would like to be upgraded to Level 2, the individual's supervisor must send an email to Carina@RisePartnership.com requesting this change. The email should include the first and last name of the individual and their work email address.

- Once this process is complete the individual's account will be promoted to Level 2
- The individual will use the same login credentials

Functionality:

- Search, view, and save consumer job posts AND create consumer job posts
- Search, view, and save provider profiles
- Message providers
- Delete job post and inform us that a match was made

Carina Role	Find consumers/ Save job	Find providers/ Save providers	Create profile	Post or Delete job	Send message	Configure settings
Level 2 - Case Manager Access provided on an **as-needed basis** to those who actively help a consumer find a care provider. (ex. Case Managers on the DD side)	✓	✓		✓	✓	

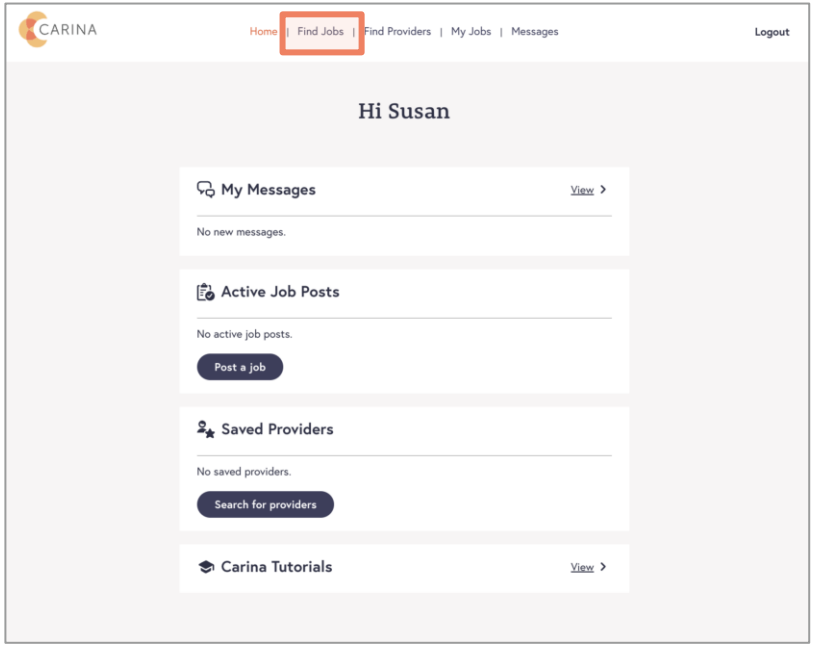
1. View Jobs

Level 2 case managers on Carina are able to view job posts on Carina.

Click “Find Jobs”

Once the Level 2 Case Manager completes onboarding, they will land in their account home page. This page shows a list of saved providers, active job posts, and messages.

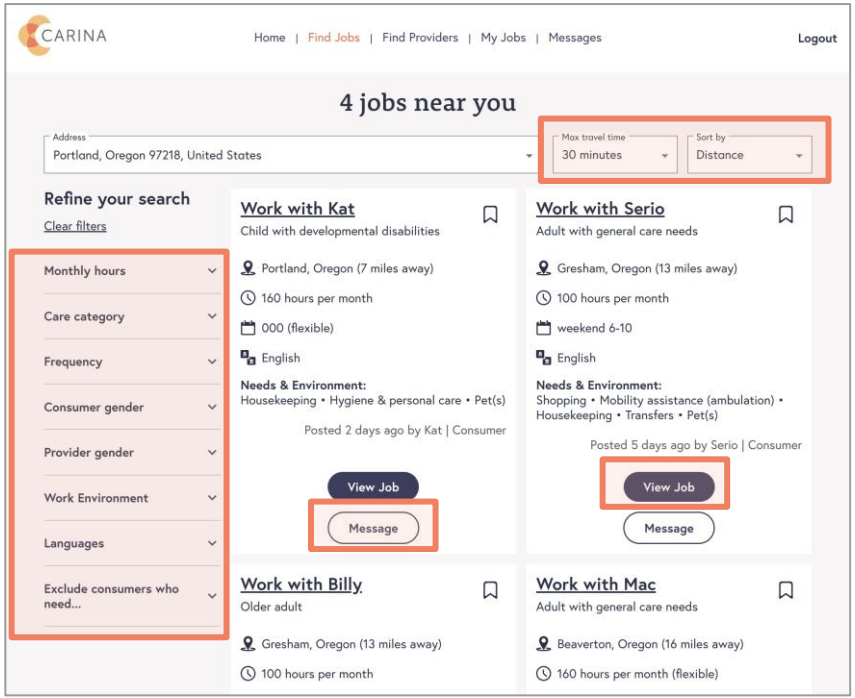
- From the account home page, click **“Find Jobs”** at the top of the page.



Filter, sort, and search

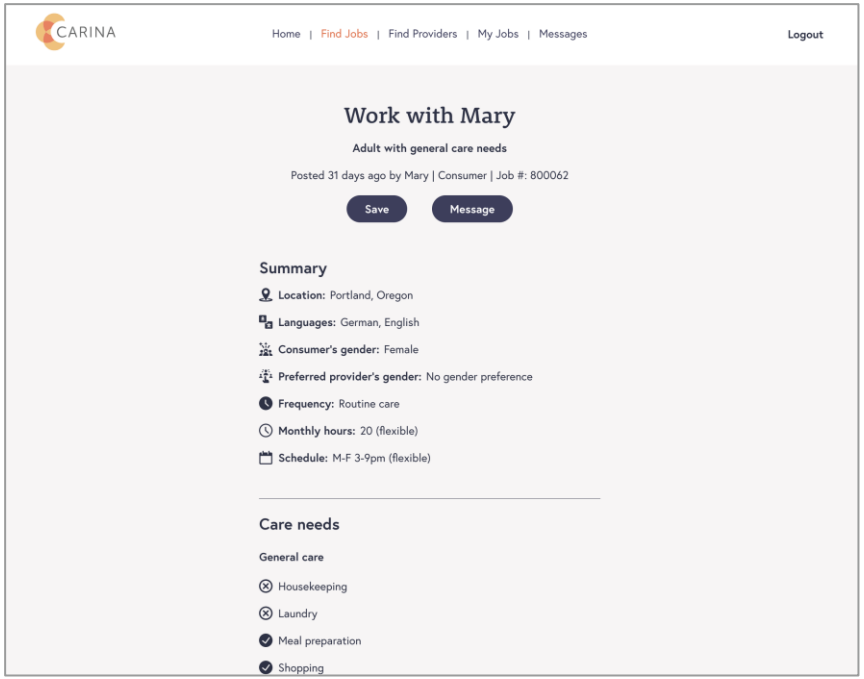
to Find Care Seekers

1. Use the drop down menus at the top to **sort** providers by a specific criteria.
2. Use the **filters** on the left to see only job posts that meet a certain criteria.
3. Next to the filters, the user will see previews of job posts that meet the user's criteria.
4. To view more information about a specific job post, click **"View Job"**.
5. To message a consumer, click **"Message"**.



View job post

1. Review the job post.
2. If the Level 2 Case Manager would like to save this job post for future reference, they can click **“Save”.** This will bookmark the job post and can be accessed again under “Saved Job Posts” in the account home page.

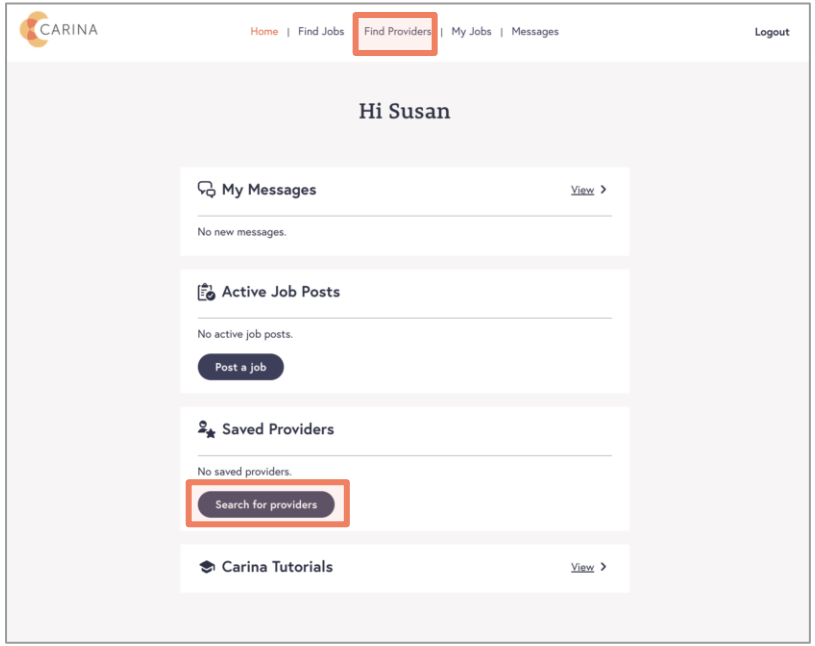


2. View Providers

Similarly, Level 2 Case Managers are also able to see provider profiles and message providers on Carina.

Click “Find Providers”

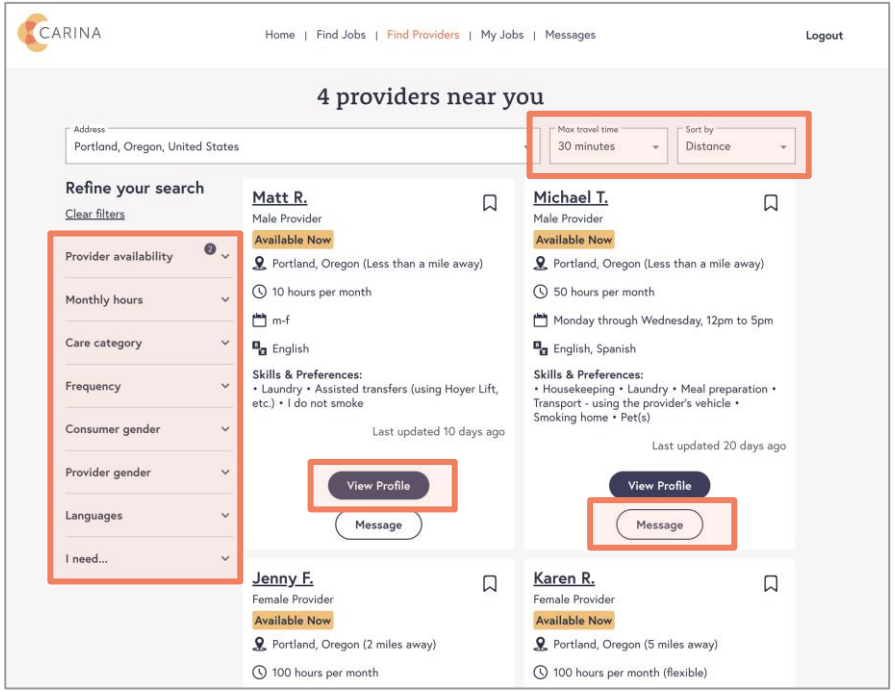
From the account home page, click **“Search for providers”** or **“Find Providers”** at the top of the page.



Filter, sort, and search

to Find Providers

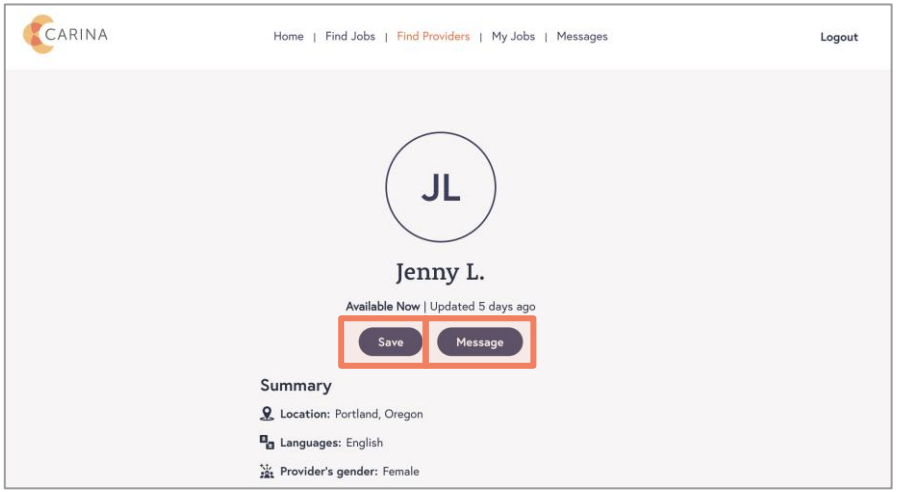
1. Use the drop-down menus at the top to **sort** providers by specific criteria.
2. Use the **filters** on the left to see only providers that meet certain criteria.
3. Next to the filters, the user will see previews of provider profiles that meet the user's criteria.
4. To view more information about a specific provider, click **"View Profile"**.
5. To message a provider, click **"Message".**



View Provider Profile

for More Detail

1. Review the provider's profile.
2. If the user would like to save this profile for future reference, they can click **"Save"**.This will bookmark the provider profile, which can be accessed again under "Saved Providers" in the account home page.
3. To message the provider, click **"Message"**.



3. Create Job Posts

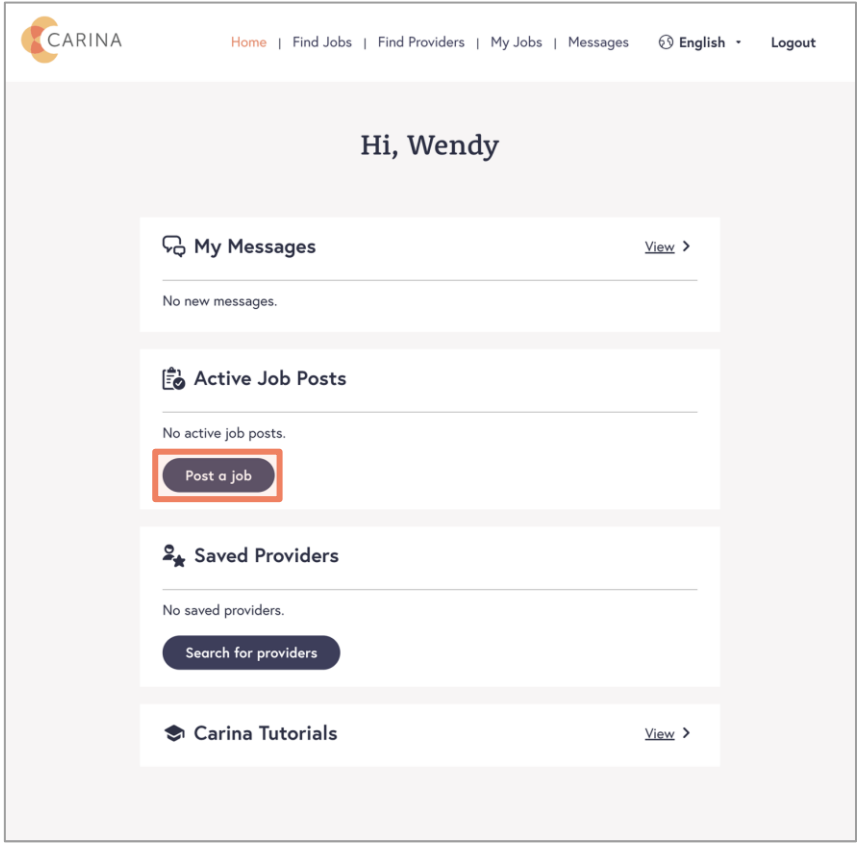
Level 2 Case Managers will be able to create job posts for consumers.

This is a two step process which requires verification and filling out the job post form on Carina.

Click “Post a Job”

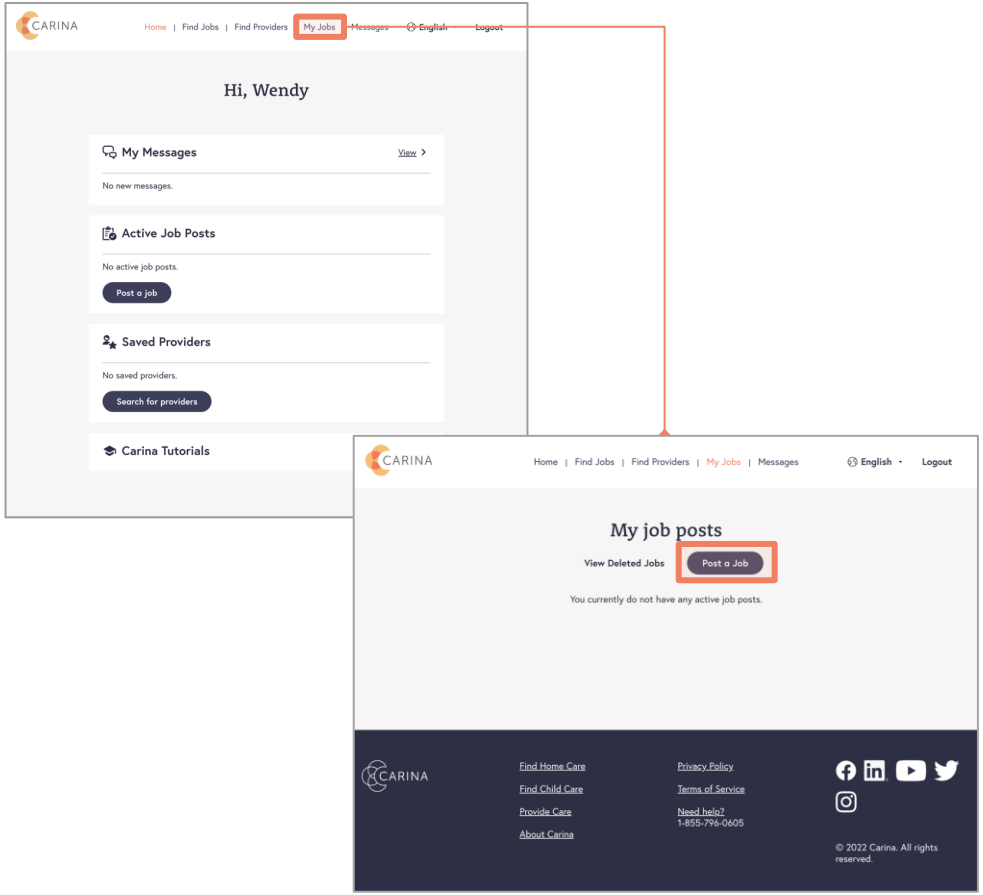
The account home page shows **Saved Providers**. In addition to this, users have a **My Messages** section and **My Jobs** link in the top navigation bar.

- From the account home page, **click “Post a Job”.**



Post a Job

Another way users can post a job is by clicking **“My Jobs”**, then clicking **“Post a Job”** from that page.

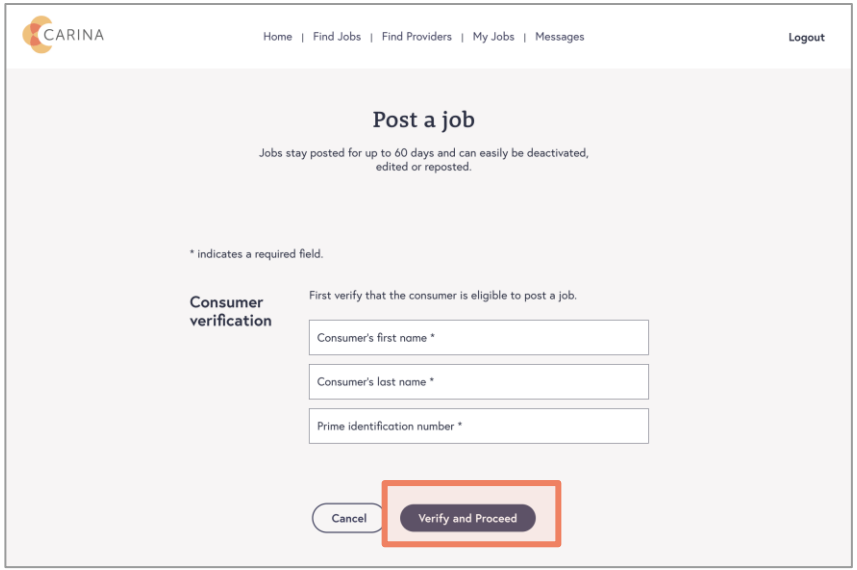


Post a Job

Verification

Before Level 2 Case Managers can post a job, they must first verify the consumer.

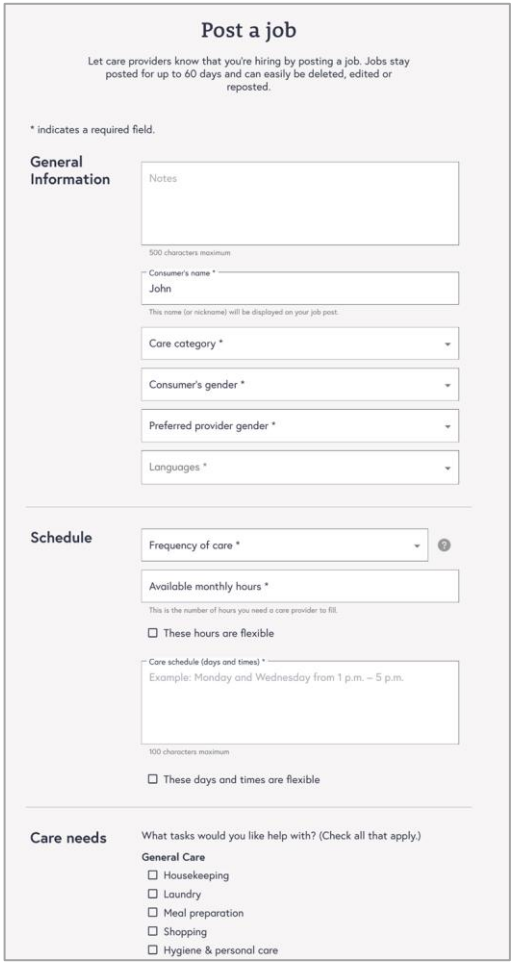
1. Enter the consumer's first and last names
2. Enter the consumer’s Client ID (Prime Number)
3. Once this is complete, click **“Verify and Proceed”**.



Post a Job

Fill out the form

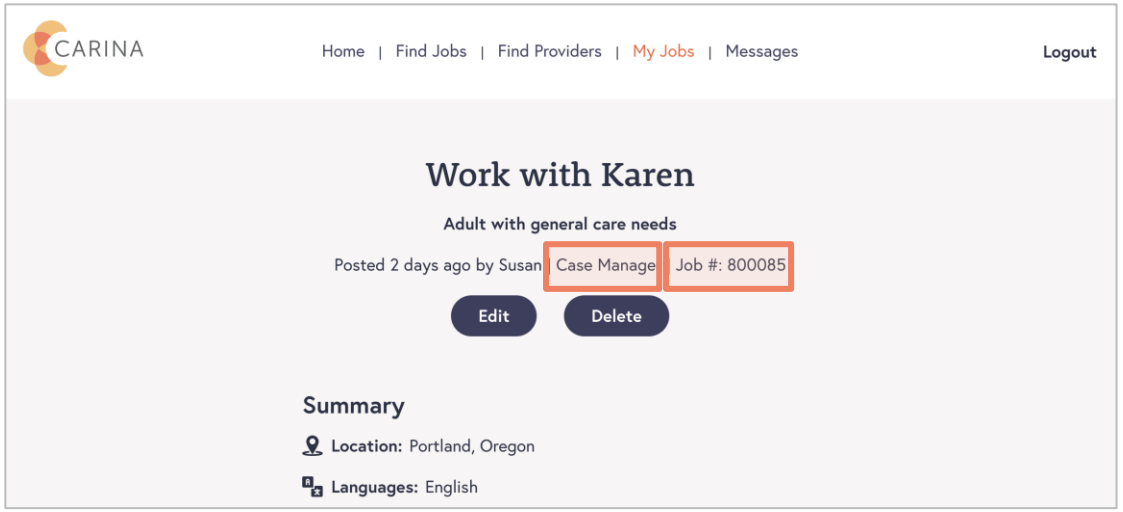
Next, fill out the job post form then click **“Post Job”** at the bottom of the page.



View Job Post for More Detail

For job posts created by Level 2 Case Managers, just under the consumer's name and description, you will see:

- The general date the job was posted;
- "Case Manager" instead of Consumer next to the job post timestamp;
- The Job # - this is specific to the job post you created. Note: You will need to **jot down the job post #** as it may be needed in certain circumstances.



4. Message anyone on Carina

Level 2 Case Managers have the ability to send messages to providers on Carina.

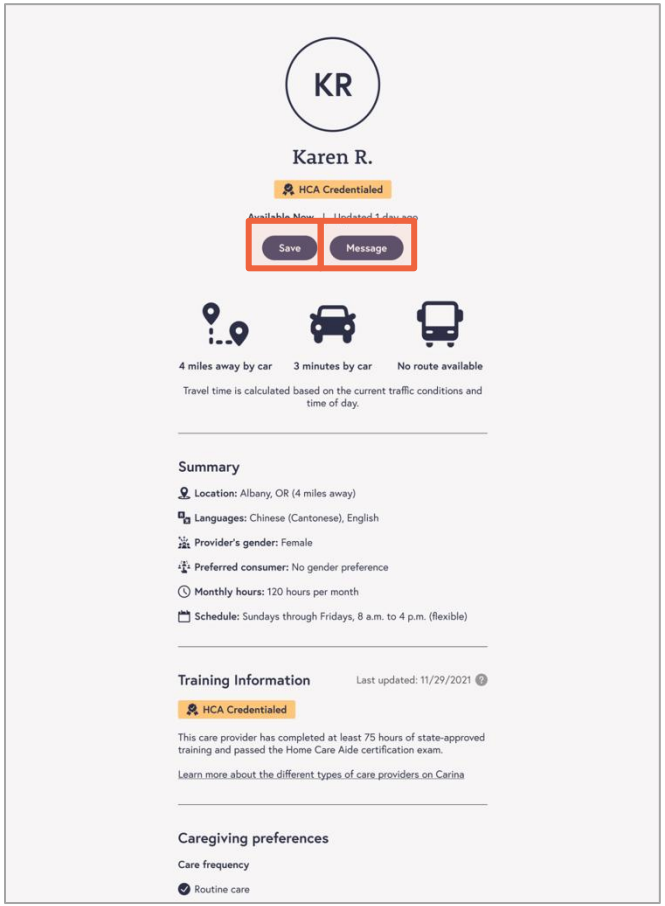
Similarly, providers can message Level 2 Case Managers about a job post that the case manager posted on behalf of a consumer.

It is important to remember when messaging a provider to ask them to share their phone number in their reply if interested in the opportunity. This is so you can have the consumer reach out to them directly (depending on the approach you are taking when communicating with providers).

View Provider Profiles

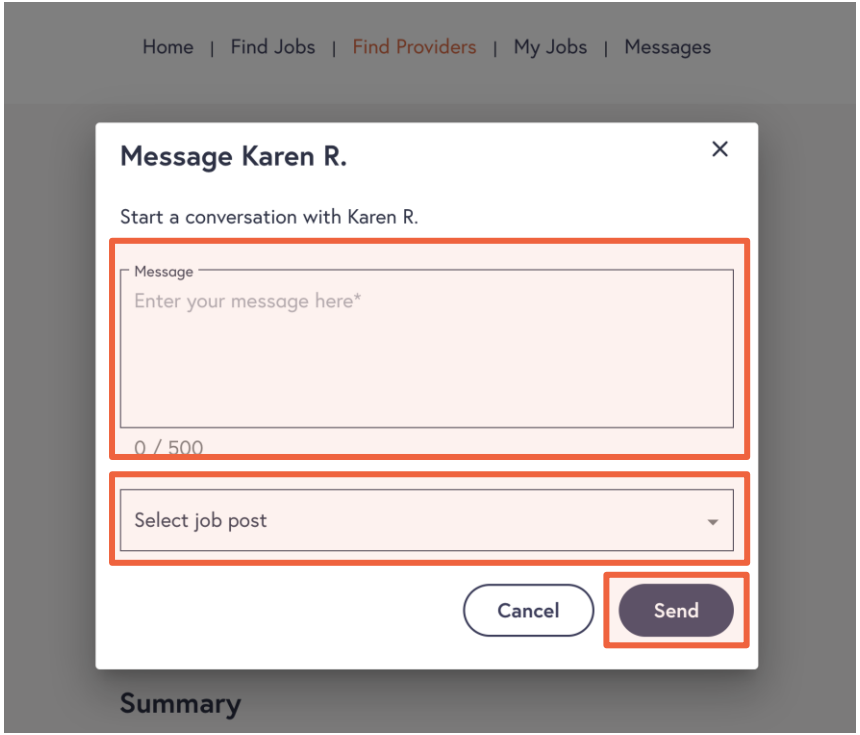
First, Case Managers must find a provider by using the search tool as discussed in Step 2. Once the Case Manager clicks on a provider profile, they should follow the instructions below:

1. Review the provider's profile.
2. If interested in working with a specific provider, Level 2 Case Managers can send a message to that provider by clicking **"Message"**.



Send a message

1. When the "Message" button is clicked, the pop-up in the screenshot appears on the page.
2. Level 2 Case Managers can **enter the message** to send to the provider. Be sure to ask for the provider's phone number if the consumer you are supporting plans to reach out to them directly.
3. Level 2 Case Managers should also remember to **select a job post** to send to the provider.
4. Once everything is filled out, click **"Send"**.



What happens now?

After sending the message, the Case Manager **waits for the provider to respond**.

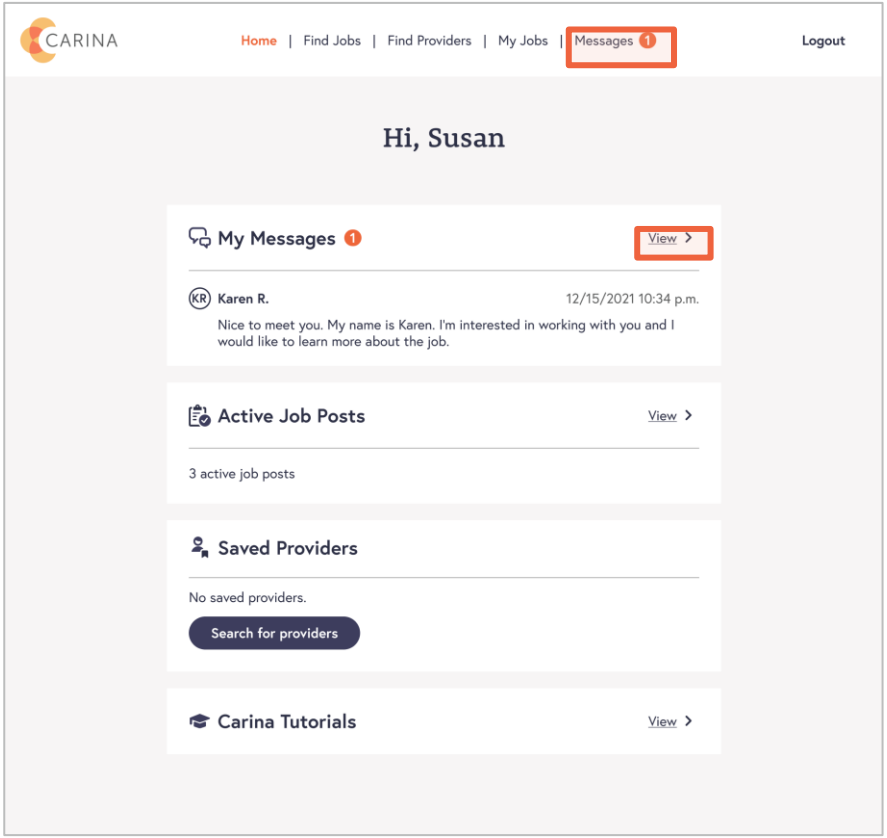
The Level 2 Case Manager will want to check their account message notifications periodically so they know when a provider has responded.

Once a provider responds, Level 2 Case Managers can reply and share the next steps. This may include setting up a time to speak with them directly, facilitating contact with the consumer, encouraging them to reach out directly to the consumer, letting them know the consumer will reach out to them, or something else.

Go to “Messages”

1. **Login** to account.

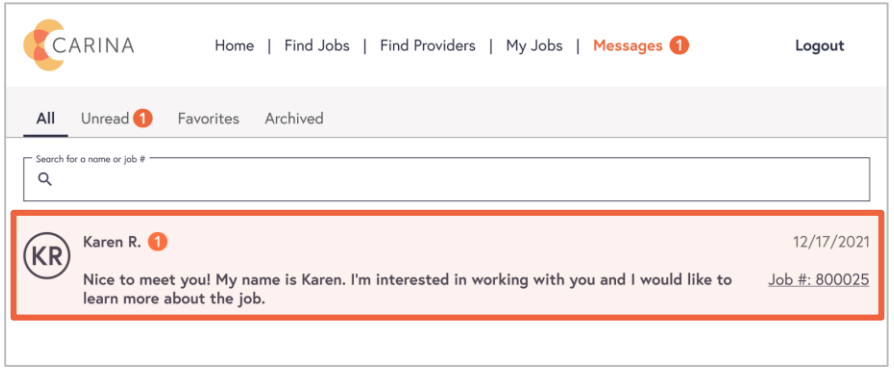
2. Click **View** or **Messages** to see the provider’s response in the inbox.



Select the message

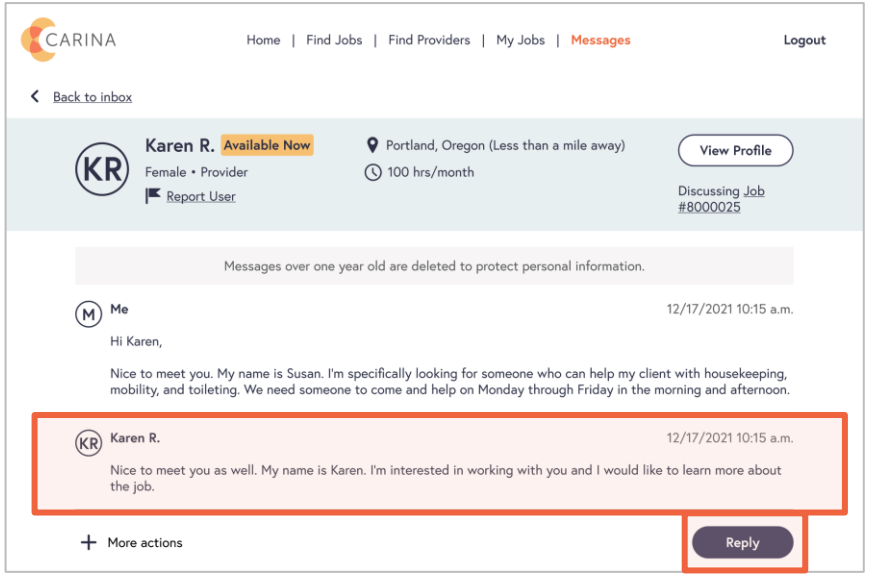
Find the new message on this page and click to read it.

Notice the job number to the right – this is associated with the job post you created on behalf of a consumer. By clicking on that number you can view the specific job post, if needed.



Read and respond

1. Read the new message sent by the provider.
2. Level 2 Case Managers can **reply** to providers to discuss more details and can schedule a call or meet in person for next steps.
3. After you have read and/or responded to your messages, just click on the Back to Inbox link to return to your messages



5. Delete Job Post

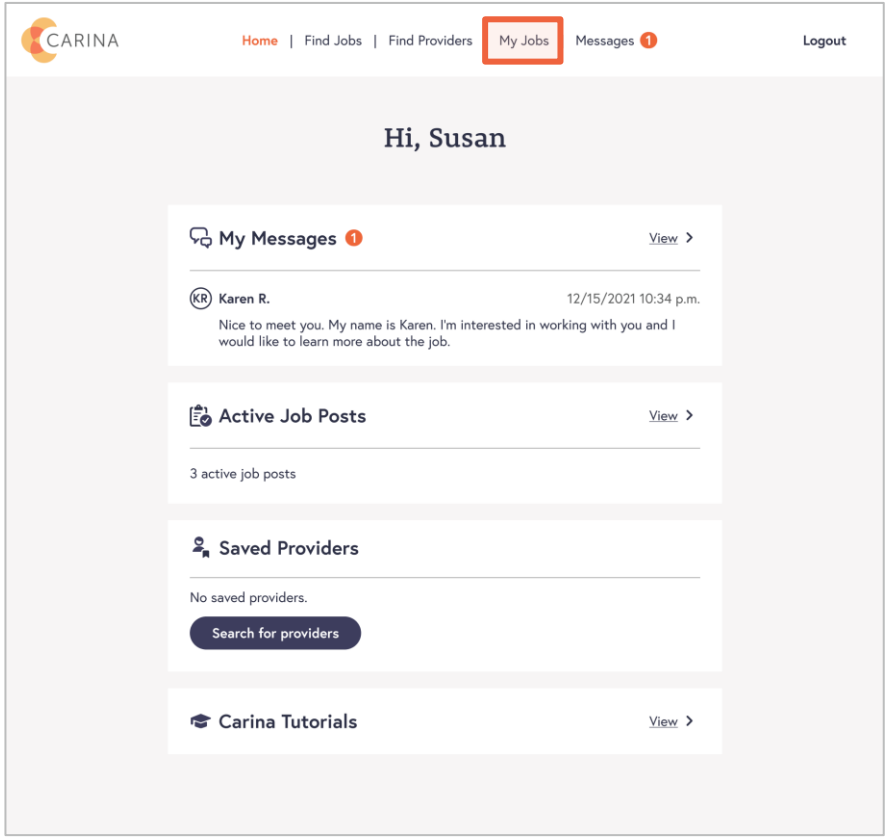
Once a consumer connects with a provider and they are approved for work, Case Managers will log back into Carina and delete the job post.

Part of this process includes letting Carina know that a match was made, that a match was not made and what happened, and asking for some details about the experience.

Once complete, the job will be deleted and will no longer appear in searches.

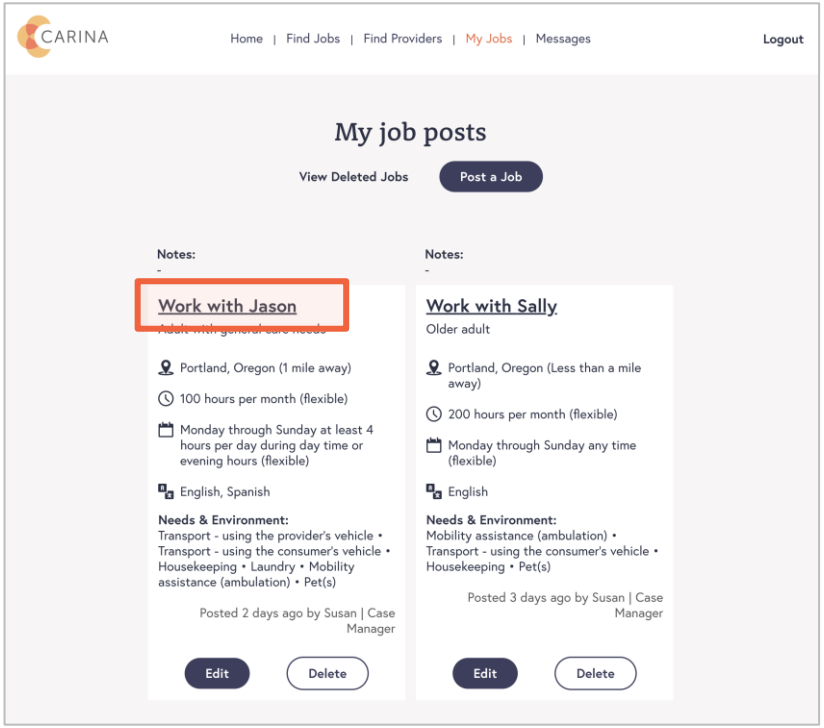
Go to “My Jobs”

Log in and go to **My Jobs** from the home page.



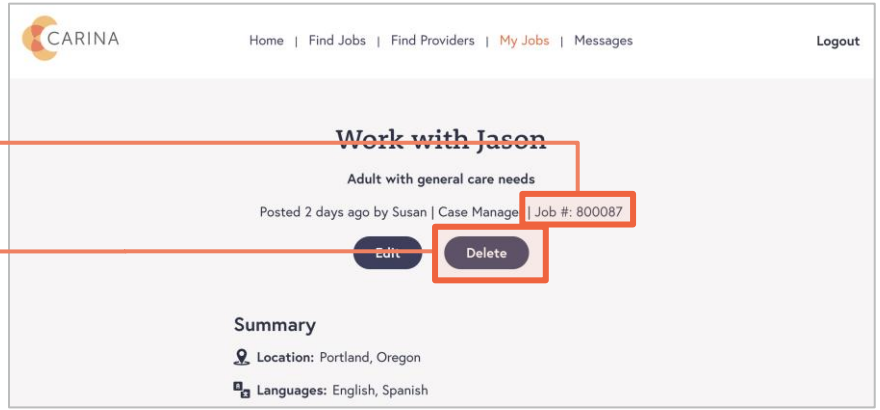
Select the job post that was filled

In My Jobs, select the job you want to delete by clicking on the **"Work with"** title.



Click on “Delete”

1. Check that you are deleting the correct job by double checking the job number.
2. Once you’ve checked, click **“Delete”**.

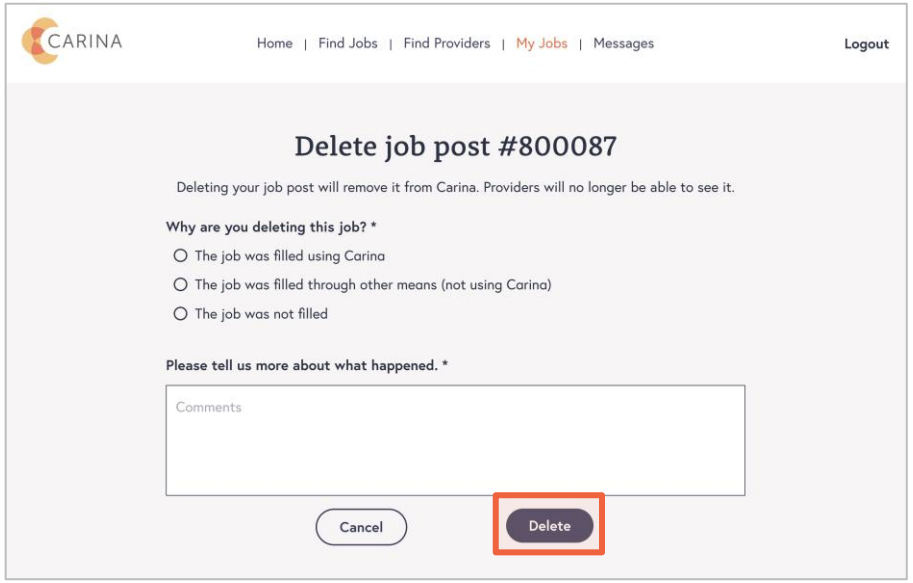


Fill out the form

1. Tell us about your match and let us know about your experience connecting on Carina.

2. Once you are done, click **“Delete”**.

While you are deleting this job post so it will no longer show up in future searches, it will still be available in the **My Jobs** section of your account for 365 days. You can **View Deleted Jobs** then edit and repost if needed.



Section 4:

-User Support
-Reporting User Process
-Security
-General Feedback

User Support

Need Additional Help?

Carina has partnered with the SEIU 503 Member Assistance Center (MAC) to provide user support for consumers, providers, and case managers in Oregon.

For questions or issues specific to using the Carina platform: Please call 1-855-796-0605 (Monday through Friday, 8 AM to 6 PM PT, with voice mail after hours) or click on *"Need Help?"* at the bottom of the Carina website and fill out the Contact Us form

Examples:

- There is a login issue or the consumer verification code is not working
- Issues with permission settings
- Carina's website is unexpectedly down

Reporting Users Process

Carina’s Approach to Negative User Behavior

Carina is an inclusive and respectful community. We prohibit discriminating language, profanity, obscene behavior and language, violent or threatening behavior, sexual harassment, and impersonation of another person.

Carina's expectations for appropriate user behavior are outlined in our Terms of Service and Community Guidelines (please refer to the examples on the following pages).

Carina's Approach to Negative User Behavior Continued

If you believe someone using the Carina site has violated our terms of service, please let us know. We take all reports seriously and take appropriate action when necessary.

You can report a user by one of the following:

- Clicking on the "Report User" link at the bottom of a provider profile, consumer job post, or message and filling out the pop-up form.
- Clicking on the *"Need Help?"* link which can be found by scrolling to the bottom of the Carina website (just above the user support number) and filling out the Contact Us form.

Example: Terms of Service Section 7 – Conduct

7. Online Conduct

The purpose of the Service is to provide care-related content, information and services. As a Registered User, you agree that:

a. You are solely responsible for the content or information you publish, display or otherwise communicate in any manner ("post") on the Service, or transmit to other Registered Users.

b. You will not post on the Site, or transmit to other users, any defamatory, abusive, suggestive, obscene, profane, offensive, sexually oriented, threatening, harassing, defamatory, libelous, religiously, ethnically or racially offensive or objectionable or illegal material. Nor will any discrimination based on gender or sexual orientation be tolerated.

c. You will use professional best practices and courtesy when interacting with other Registered Users including responding promptly to messages, promptly declining jobs or Care Providers you are not interested in working with, and being respectful of scheduled interviews or meetings over the telephone or in person.

d. You will use the Service in a manner consistent with any and all applicable local, state, national and international laws and regulations, including, but not limited to, United States export control laws. You are not located in, under the control of, or a national or resident of any country which the United States has (i) embargoed goods, (ii) identified as a "Specially Designated National", or (iii) placed on the Commerce Department's Table of Deny Orders. Registering as a Registered User and use of the Service is void where prohibited.

e. You will not provide inaccurate, misleading or false information to Carina or to any other Registered User. If information provided to Carina, or another Registered User, subsequently becomes inaccurate, misleading or false, you will promptly notify Carina of such change.

Example: Community Guidelines

Community guidelines

Welcome to our community! We want everyone to have a great experience on Carina. Please follow our guidelines to ensure a great experience on our website.

Be safe

Please don't share personal health information online and be careful when sharing contact information or meeting people in person.

Be aware Carina is not an agency

Carina is a self-service tool to find providers, but it's not a guarantee of work.

Be responsive and professional

Please respond quickly to messages, and avoid unprofessional, discriminatory, inappropriate or abusive language.

Example: FAQ Guidance

How do I report inappropriate behavior on Carina?

Carina is an inclusive and respectful community, and we prohibit discriminating language, profanity, obscene behavior and language, violent or threatening behavior, sexual harassment and impersonation of another person.

If you believe someone using the Carina site has violated our terms of service, please let us know by clicking on the “Report User” link at the bottom of the user’s message, profile or job post. We take all reports seriously and will take action if necessary. We reserve the right to remove users who violate our terms of service. You can also request to be contacted regarding the report. Please see our Terms of Service for more information.

Important: If this is an emergency situation, please dial 911.

Security

How we keep you and our website secure

You can check out the following information on our website to become familiar with our security guidelines:

- Terms of Service
- Privacy Policy
- Community Guidelines

A quick reminder of general security best practices:

- Please do not share passwords
- Log off when not actively working with the Carina web application
- Report suspicious activity; i.e. stranger asks for password or asks to download data

General Feedback

We Love Feedback!

For **sharing general feedback** or your experience on the Carina platform: Please reach out to Melissa Lymburner at RISE Partnership/Carewell SEIU 503 at carina@risepartnership.com

Examples:

- Recurring issue among users (user interface issue)
- Suggestions for improvements/adjustments
- Requests for additional supports

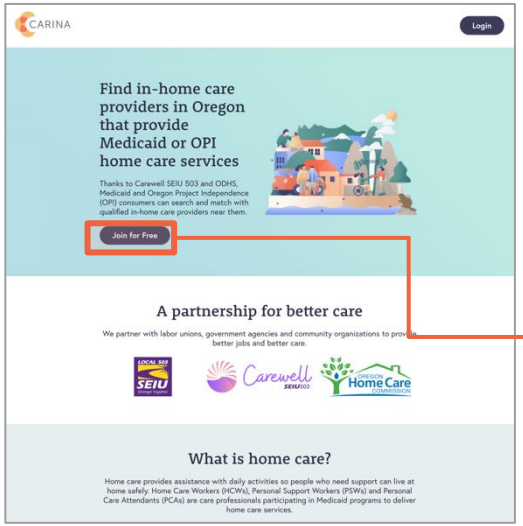
Section 5:
Consumer Experience

Consumer Experience

There are 7 primary steps for consumers on Carina:

1. Join for free on the Oregon consumer landing page
2. Register and onboard
3. Create a job post
4. Search and message a provider
5. Learn more about a provider
6. Match!
7. Share experience

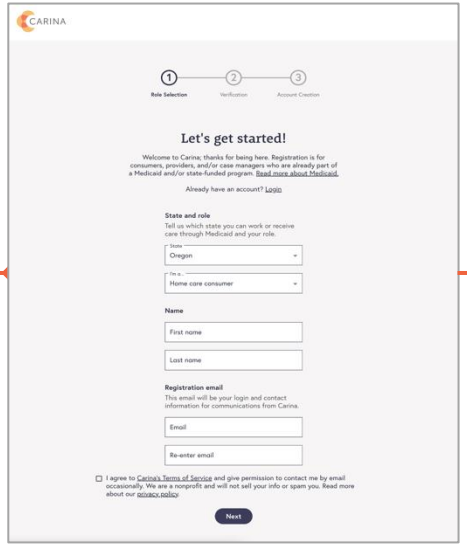
1. Receive and click invite link



Oregon landing page

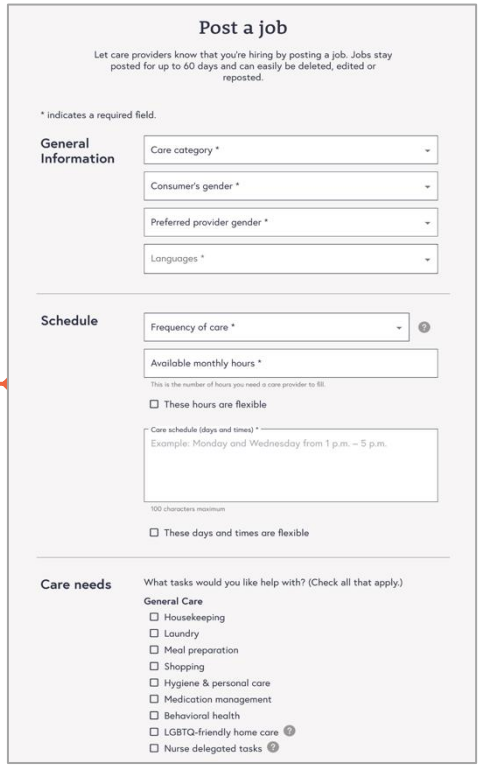
2. Register and Onboard

This step includes verification, account set up, and onboarding process



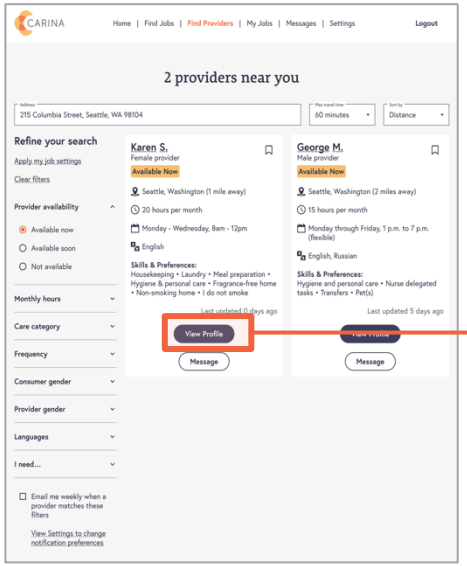
Registration page

3. Create a job post

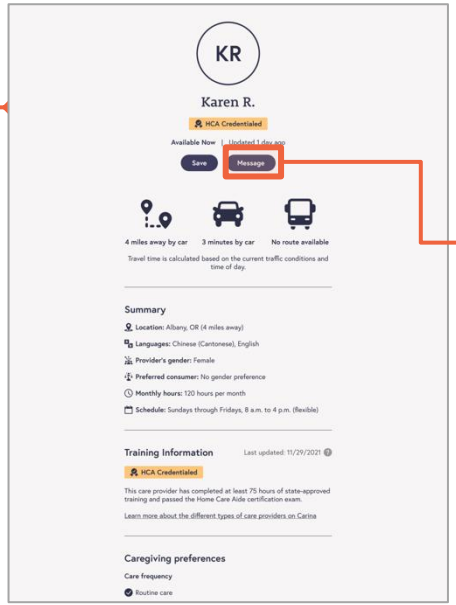


Post a job

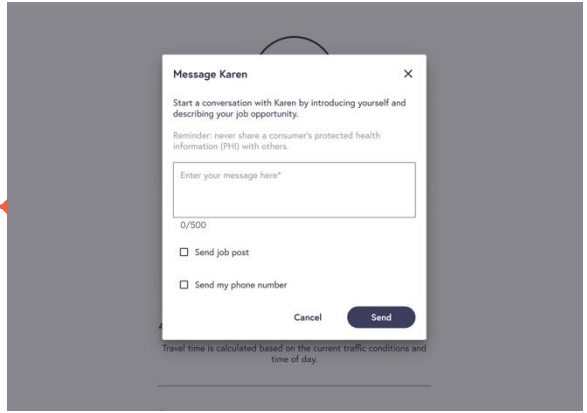
4. Search and message a provider



Search page

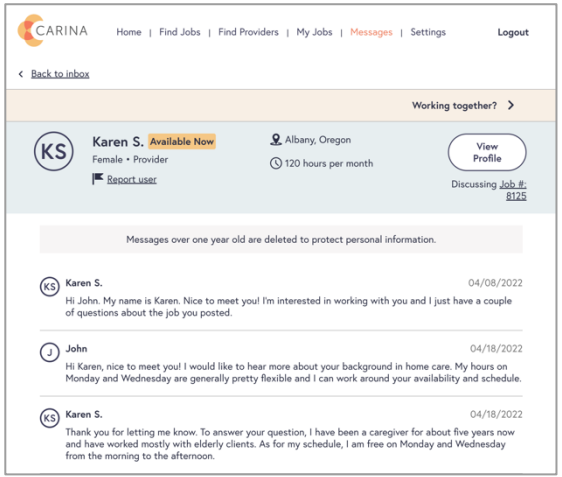


Provider profile page



Messaging form

5. Learn more about a provider



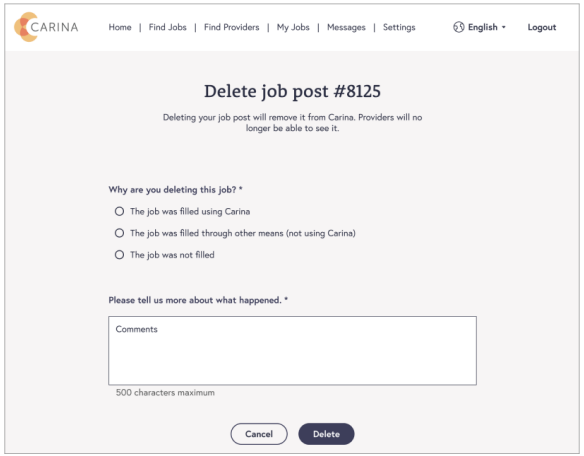
Messages

6. Match!

After the consumer speaks with the provider and decides to work together, the consumer must let the case manager know about the news.

This step happens offline of Carina.

7. Share your experience



Working together? form

Ongoing Encouragement

Once a consumer registers their email on Carina, they are enrolled in periodic communications intended to support and encourage them toward successfully matching on Carina.

CARINA

Hi Friend,

Most care-matching services are for-profit, which leads to membership fees, messaging fees, and more. At Carina, we're a non-profit, which means **we will never charge you for searching and matching with home care agencies on our platform**.

Our organization started with a group of underserved and undervalued care providers who rolled up their sleeves and began creating the world they wanted to live in. A world where high quality care would be accessible to everyone who needs it and care workers would be respected with good paying jobs. In 2016, Carina was launched with the commitment that our services are always free. You can search for care on Carina whenever you need to - **see below for tips on using our services**:

How to Use Carina

We recognize that at some point every individual will provide care for a loved on or need care for themselves. To help make this process easier, we've created an online tool and implemented standards that take the guesswork out of vetting home care providers, so you can focus on finding the care you need.

1. **Start Your Search**: You can start your search for a home care provider at any time. While you have already reached out to a home care agency, we encourage you to start a new search if:
   - You want to view the most up-to-date availability in your area
   - Your desired location has changed
   - Your care needs or preferences have changed
   - You need another home care provider
2. **Filter Based on Your Needs**: After submitting you zip code, you'll find all of the home care agencies that have available providers in your area. To narrow your search, use the dropdown menus to ensure only the agencies most relevant to your needs are visible.
3. **You Decide**: After reviewing you options, you get to decide if you'd like to move forward and connect with the hme care agencies available. When sending a message to the agency, include information about the specific care you're seeking and the best times you can be reached. The more information you provide, the more equipped the agency will be to assist you.
4. **Connect with an Agency**: Once the home care agency receives your request to connect, they will reach out to you directly to discuss your care needs, go over payment options and match you a care provider that best meets your needs.

To learn more about Carina, be sure to follow us on Facebook, Instagram, Twitter, LinkedIn and YouTube. We appreciate your support as we work to make quality, affordable care accessible to all and connect providers to good, steady work.

With Care,

Rachael from Carina

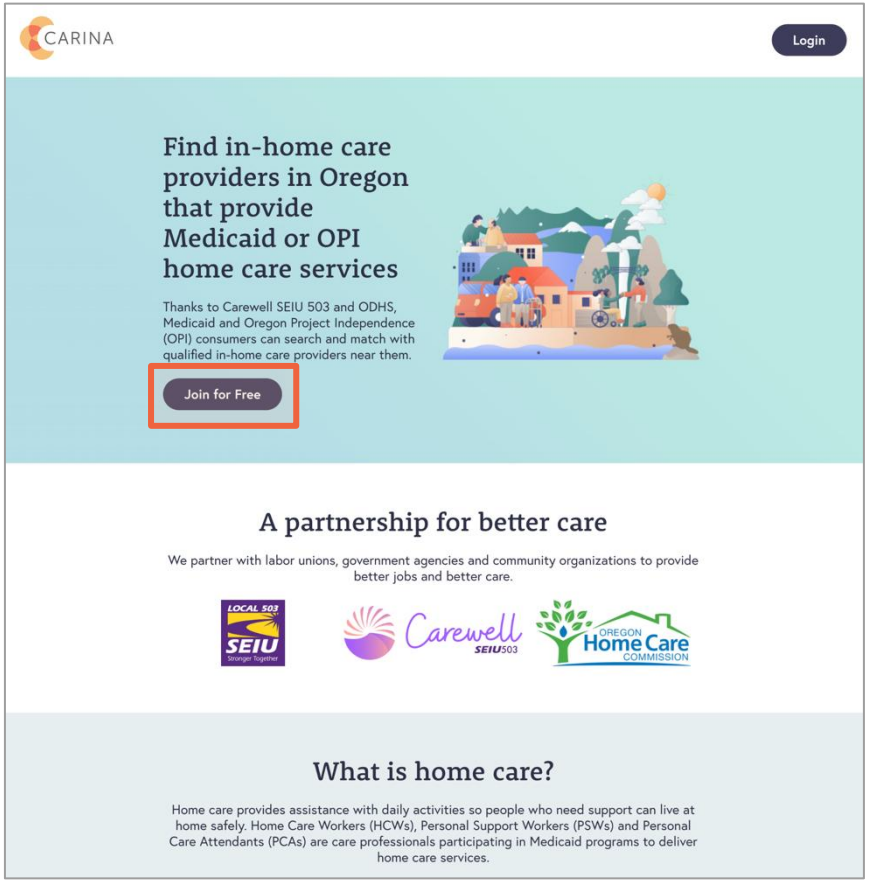
Questions? Email info@carina.org.
Carina.org, 215 Columbia St, Seattle, WA.
Unsubscribe or update your email preferences.

Carina.org, 215 Columbia St, Seattle, WA 98104
Unsubscribe Manage preferences

Consumer Experience
In Detail

1. Join Carina

1. The consumer is referred to the Consumer Landing Page Link
2. To register, the consumer must click “Join for Free”.



2. Register and onboard

Once the consumer clicks the “Join for Free” button from the landing page, they start the registration process.

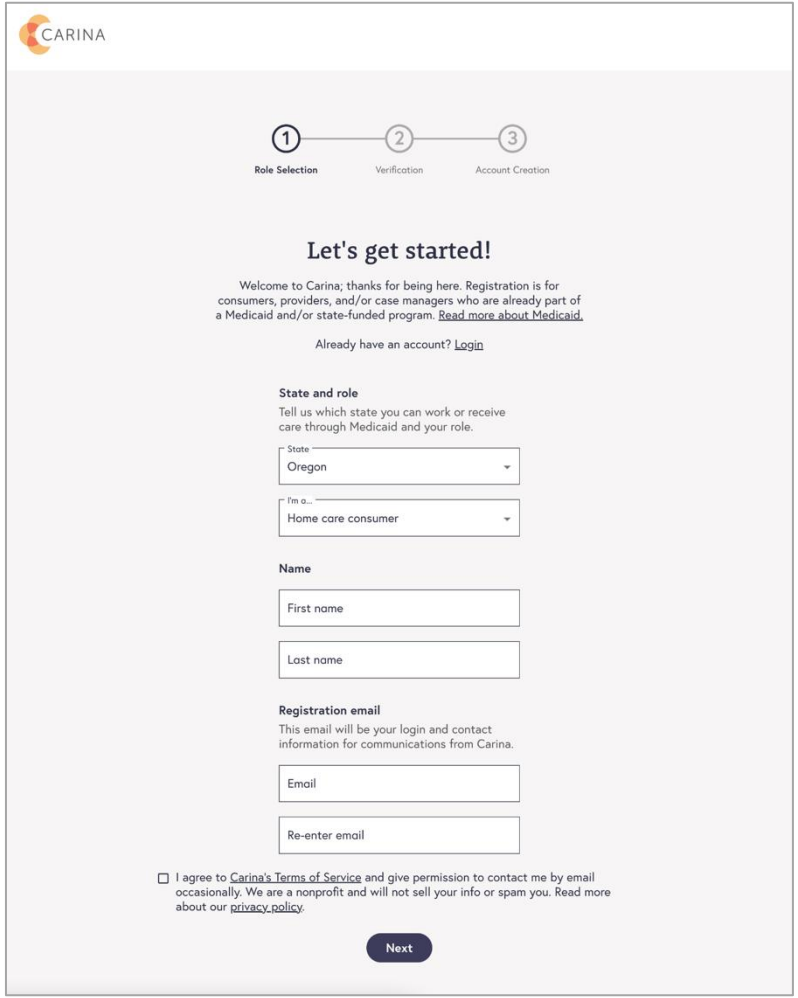
The next few slides will cover the registration and onboarding process to create a Carina account.

Registration

Role Selection

1. Fill out the form by entering the information below:
    - State
    - Role
    - Name
    - Email

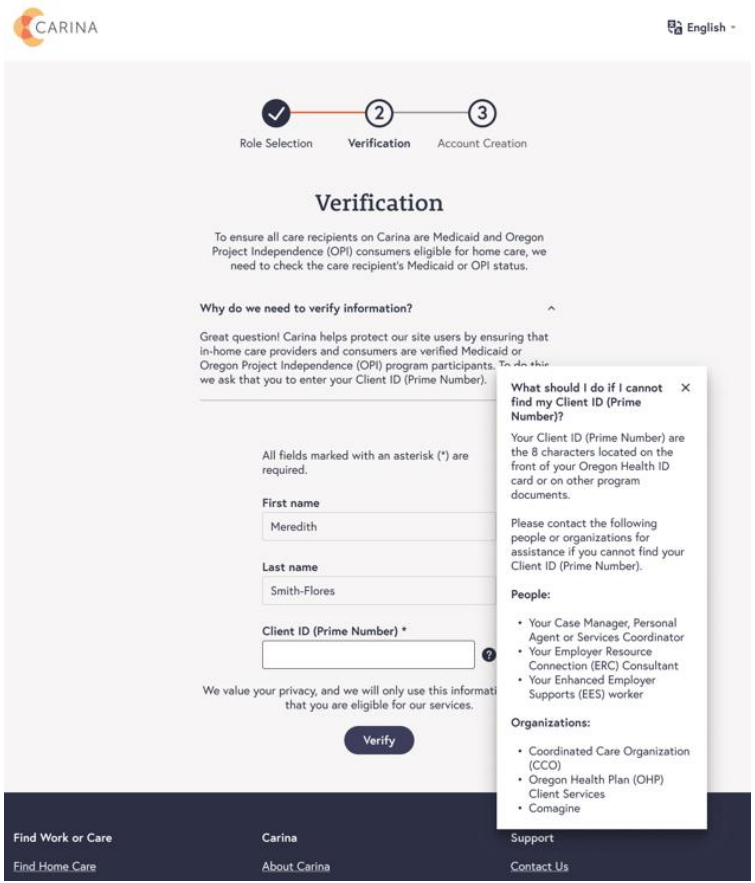
2. Afterwards, agree to ToS and click “Next”.



Registration

Verification

1. Enter their Client ID (Prime Number)
2. Click “Verify”.

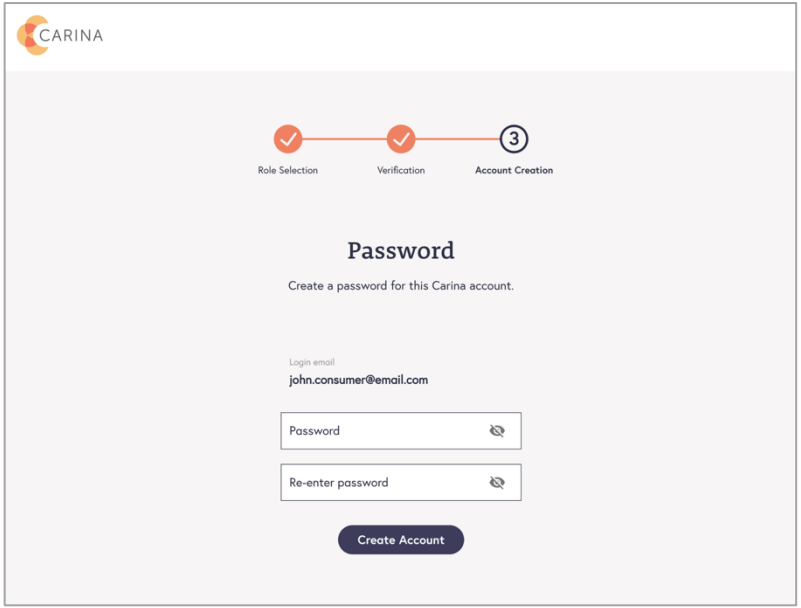


Registration

Password

1. Set your password by filling out the form.
2. Click “Create Account”.

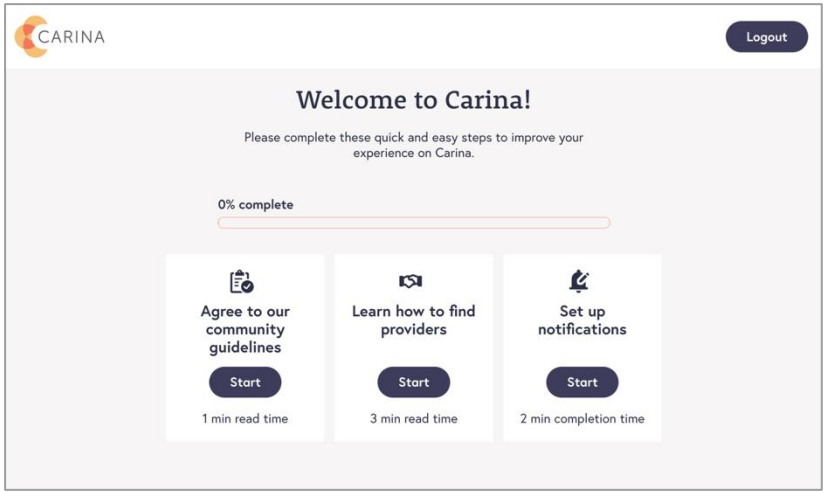
Note: The email that appears on this page is the one that was inputted by the user in the Role Selection step.



Onboarding

Once the consumer creates a password, the consumer will need to complete the onboarding steps.

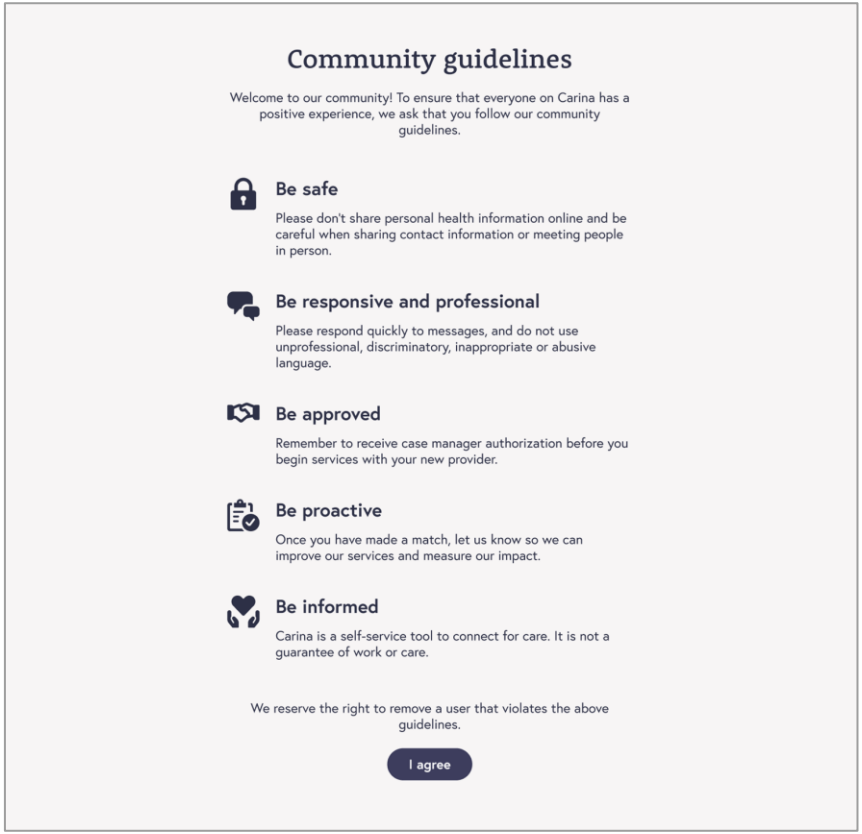
- Community guidelines
- “Learn how to find providers” tutorial.
- Set up notifications



Onboarding

Community Guidelines

1. Consumer should read through the guidelines.
2. After reading the information, click “I agree”.



Onboarding

Set up notifications

Email notifications:

- Required to receive message notifications, but can be turned off later in settings.

  Note: This is important in order to know when a provider on Carina sent you a message.

Text notifications:

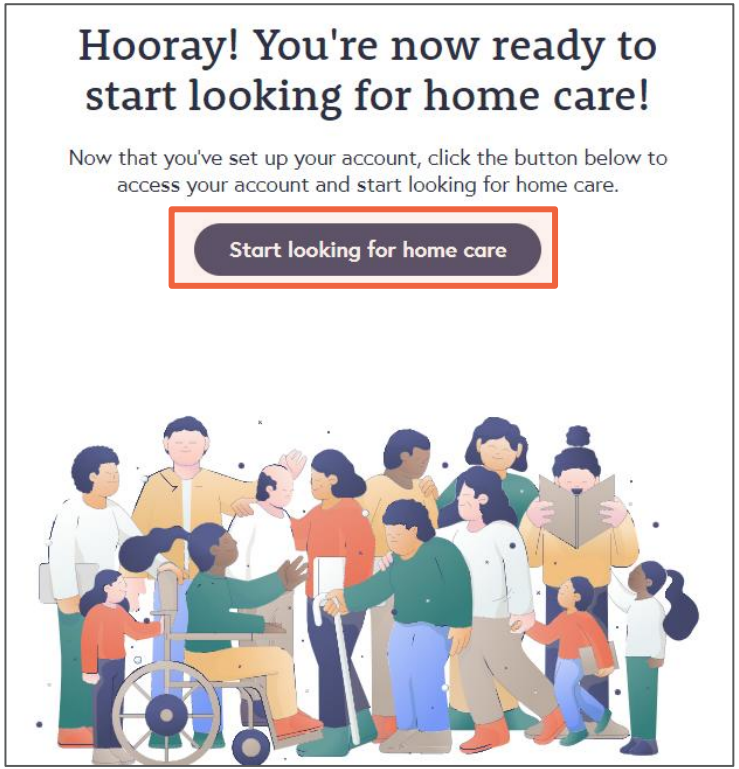
- Consumer must consent to receiving text notifications if they choose to receive them and must also provide a phone number.

Address:

- Entering address can help consumers find providers nearby.

Onboarding Completed

1. Onboarding is complete.
2. Consumers can begin looking for home care by clicking the “Start looking for home care” button.



3. Create a job post

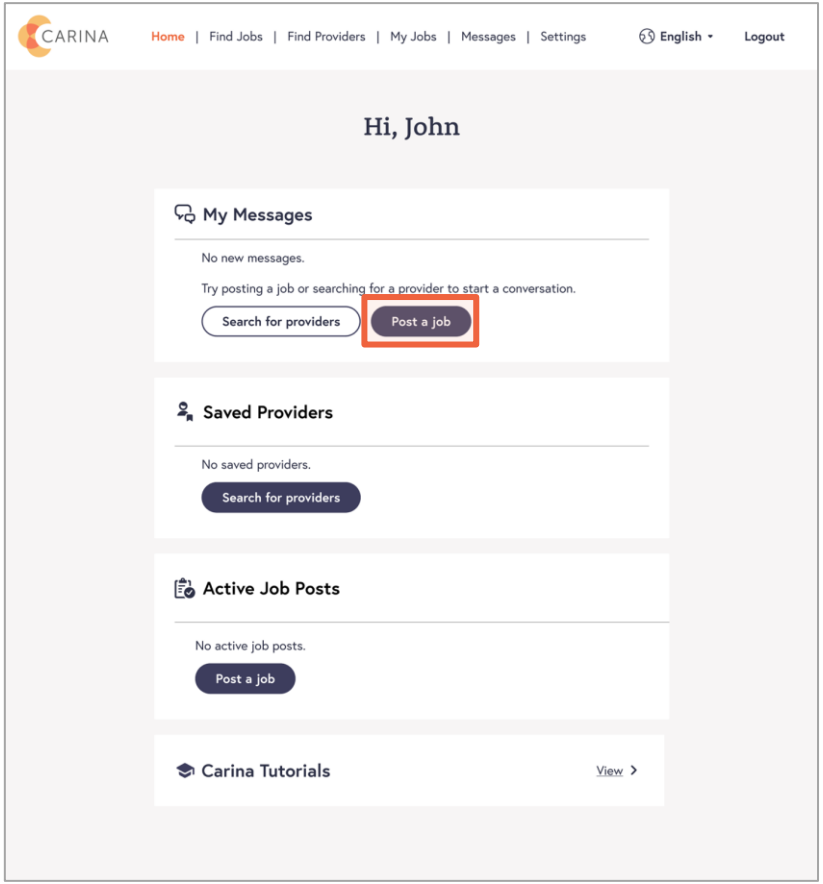
Now that the consumer has a Carina, we encourage the consumer to create a job post.

Having a job post allows providers on Carina to learn more about the consumer and the consumer's care needs.

Click “Post a job”
to Find Support

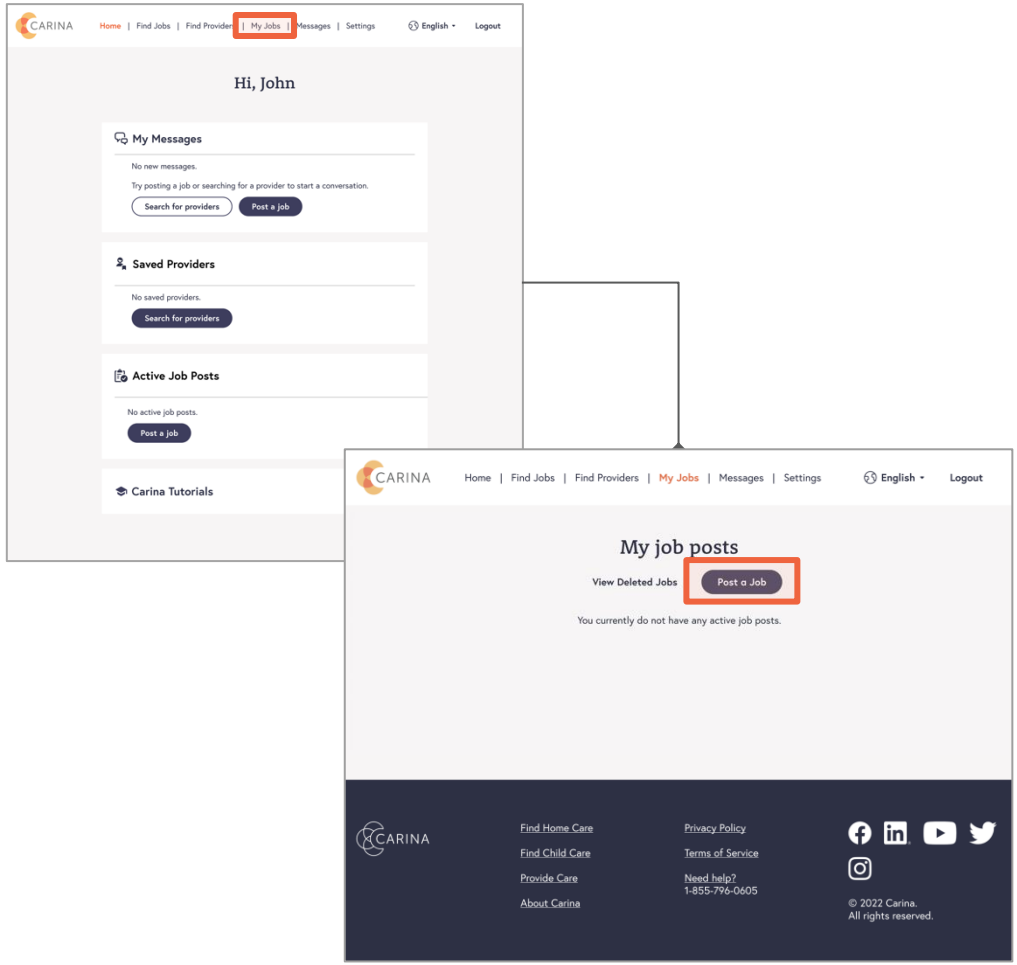
Once the user completes onboarding, they will land in their **account home page**. This page will show previews of new messages, saved providers, and the consumer’s job posts.

- From the account home page, click “Post a Job”.



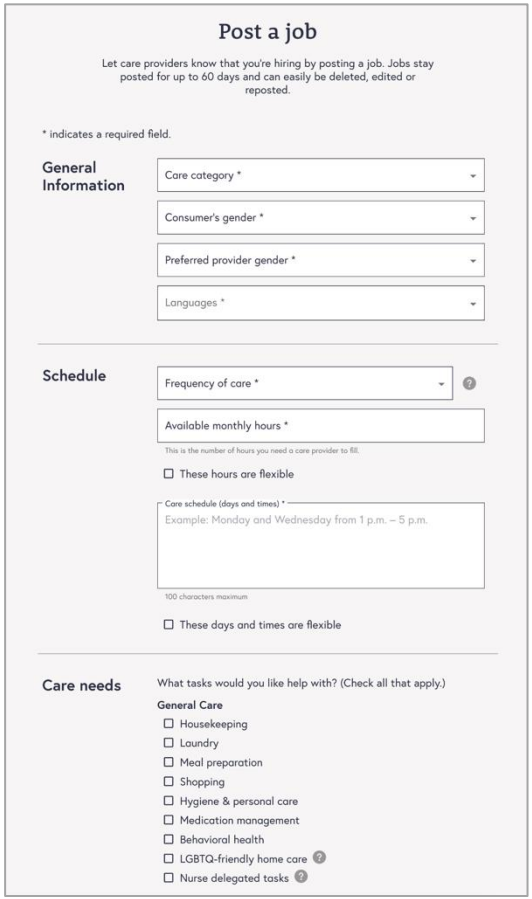
Click “Post a Job”
Continued

Another way users can post a job is by clicking “My Jobs”, then clicking “Post a job” from that page.



Complete the form and “Post Job”

1. Fill out the form
2. Once filled, click “Post Job” at the bottom of the page.

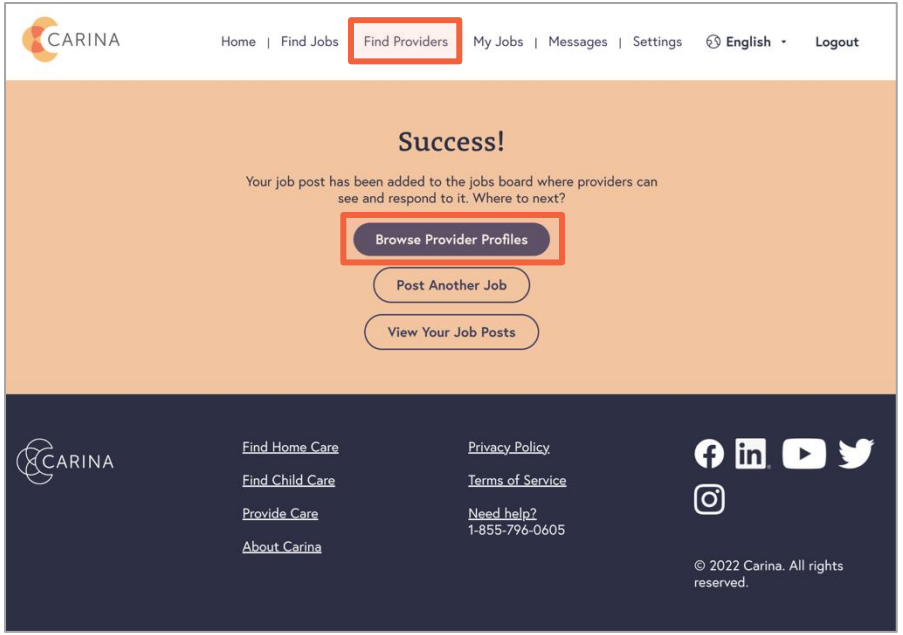


4. Search and message a provider

Great! Now the consumer can start searching for providers. The next few slides will cover how to get started.

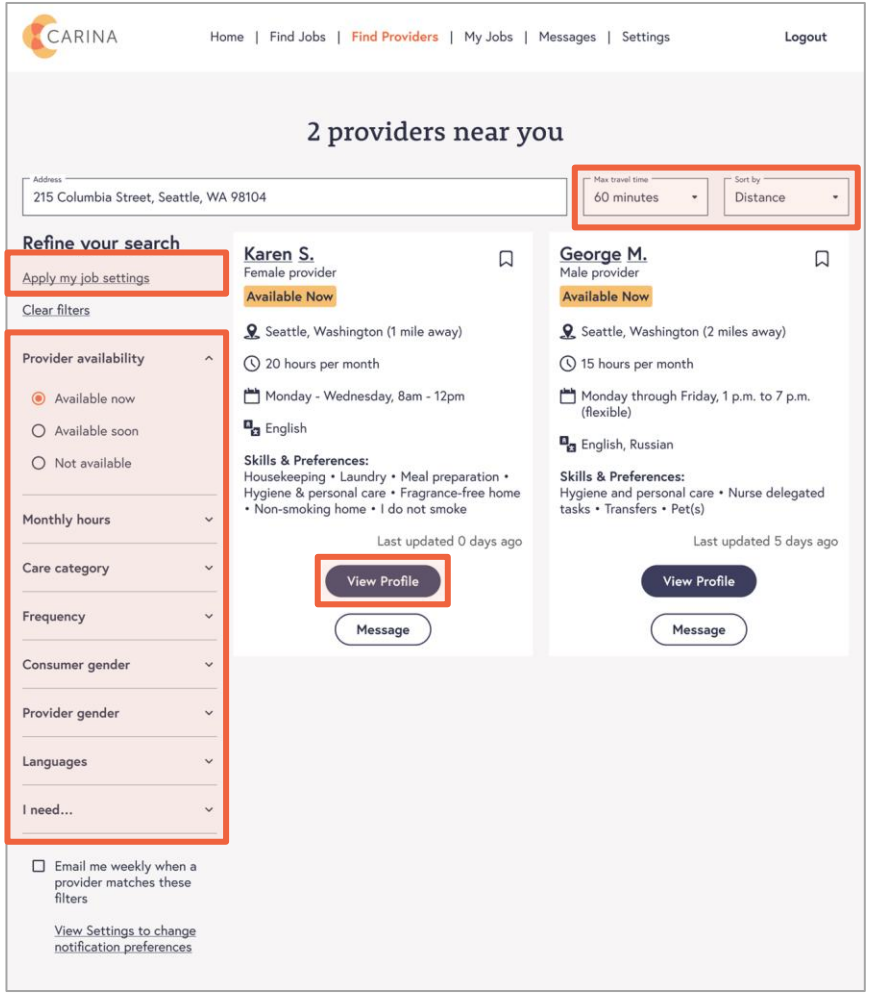
Start searching

After creating a job post, consumers can start searching for a provider by clicking “Find Providers” at the top of the page or on “Browse Provider Profiles”.



Filter, sort, and search

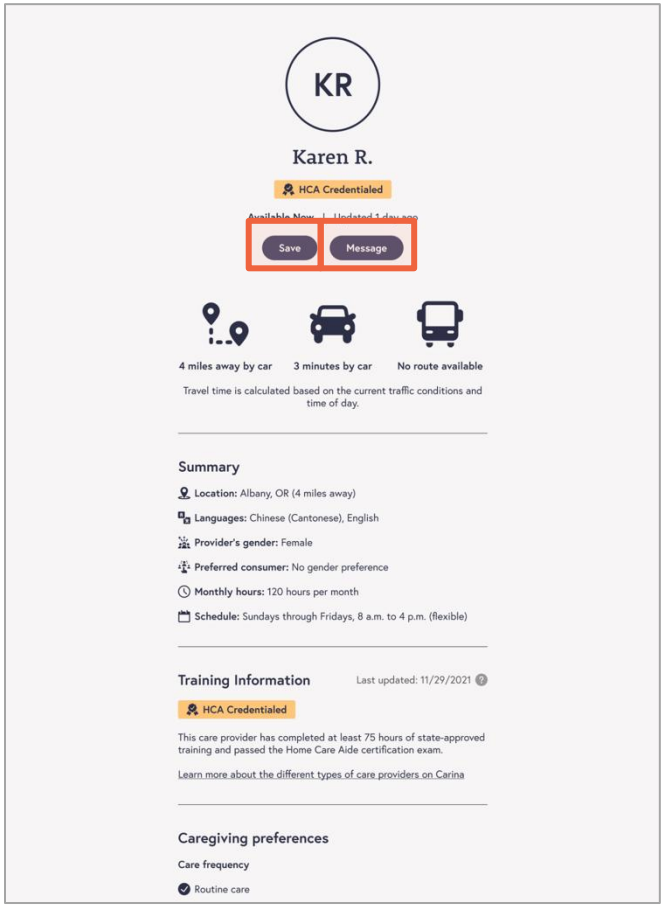
1. Use the drop down menus at the top to **sort** providers by a specific criteria.
2. Use the **filters** on the left to see only providers that meet a certain criteria.
3. **“Apply my job settings”** will fill out the filters based on the consumer’s most recent job post.
4. Next to the filters, the user will see profile previews of providers that meet the user’s criteria.
5. To view more information about a specific provider, click **“View Profile”**.



View Provider Profiles

for More Information

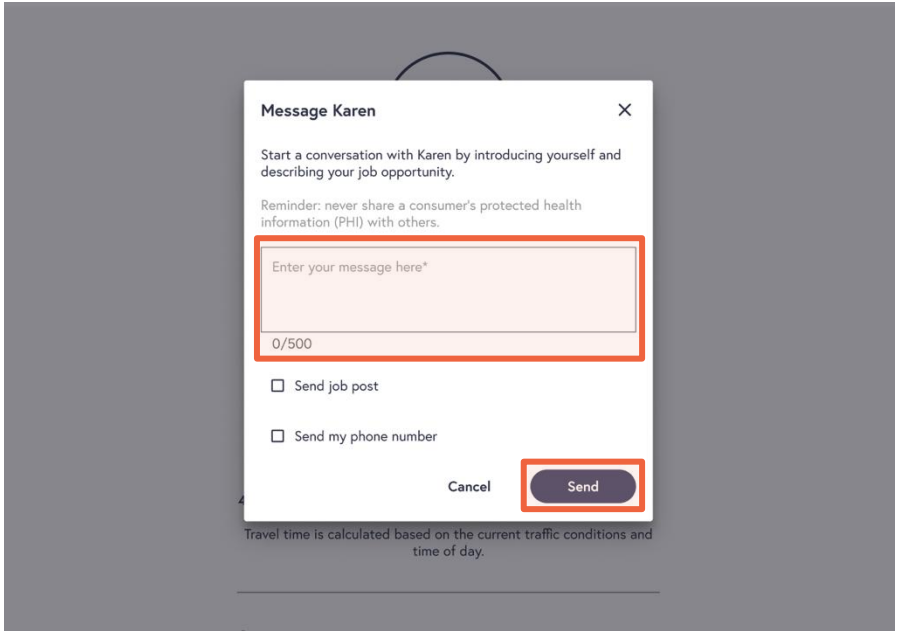
1. Review the provider's profile.
2. If interested in working with this provider, the consumer can **message** the provider.
3. If the consumer would like to save this profile for future reference, they can click **"Save".** This will bookmark the profile and can be accessed again under "Saved Providers" in the account home page.



Send a message

to Connect with the Provider

1. The consumer should **write a message** to the provider.
2. The consumer can choose to also send the provider their **phone number**.
3. The consumer should click **“Send”** once the form is filled out.



What happens now?

After sending the message, wait for the provider to respond back.

The consumer should keep an eye out on email notifications to alert them that the provider has responded back.

If the consumer has turned off messaging notifications, we recommend that they turn them on. If not, they will have to login in more frequently to check manually that someone has messaged.

5. Learn more about a provider

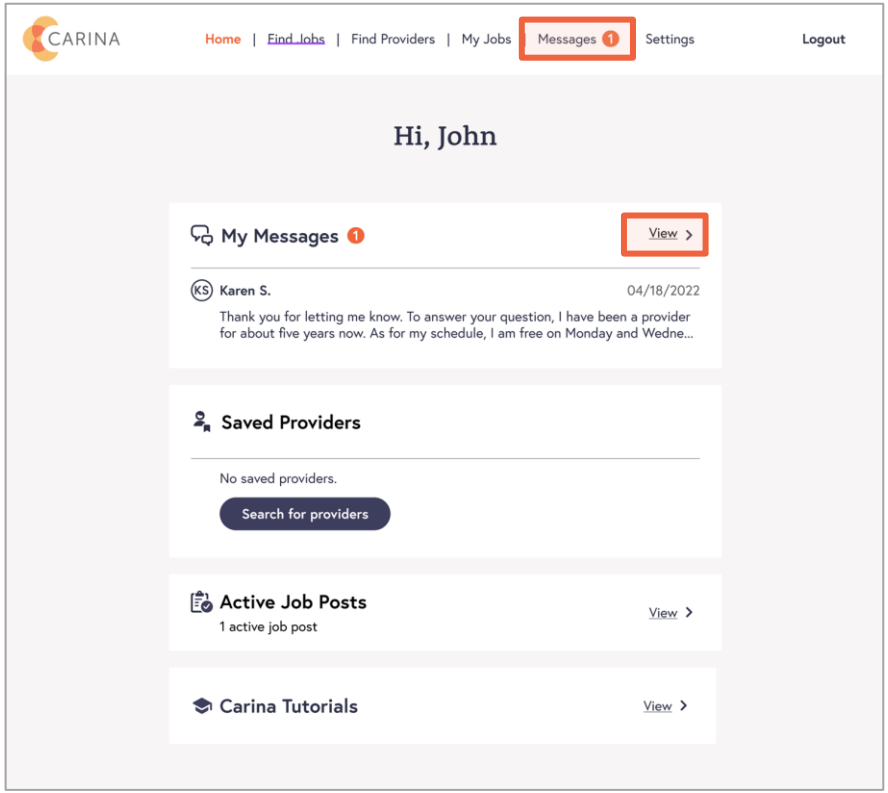
Once a provider messages the consumer, the consumer should log back into Carina to respond back.

In this conversation, the consumer and provider can set up times to speak in person and to learn more about the job opportunity.

Go to “Messages”

to Check your Inbox

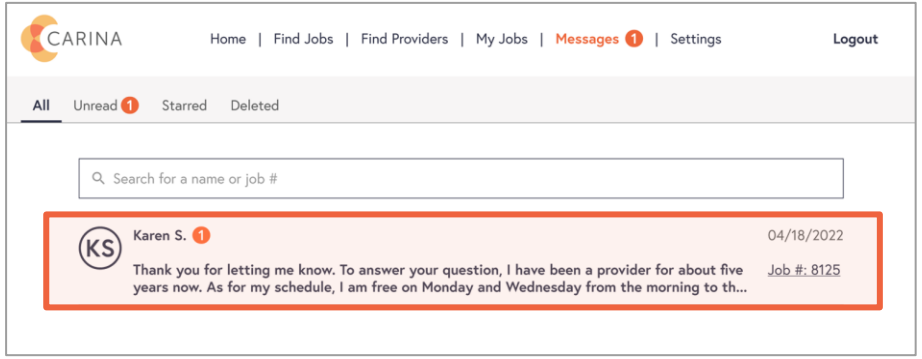
1. **Login** to account.
2. Click **View** or **Messages** to see the provider’s response in the inbox.



Select the message

to read the message

Find the new message on this page and **click to read it.**

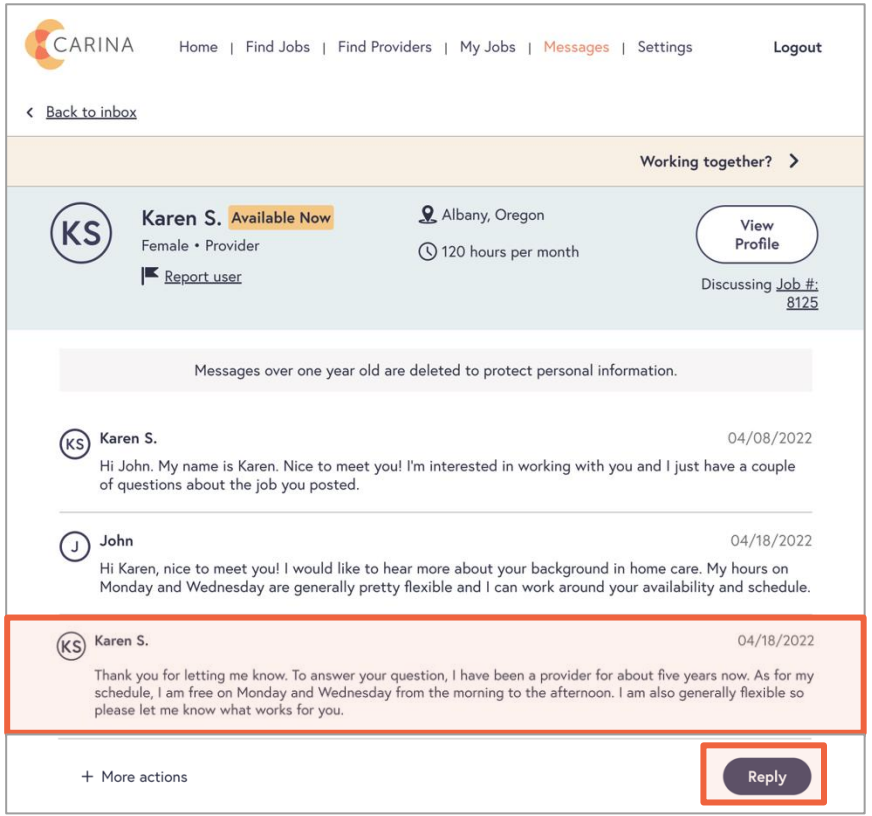


Read and respond

to the message

1. **Read the new message** sent by the provider.
2. Consumers can **reply** to providers to discuss more details and can schedule a call or meet in person for next steps.

Note: Click **"+ More actions"** to favorite or archive a message.



6. Match!

Hooray!

After the consumer speaks with the provider and decides to work together, the consumer must let the case manager know about the news.

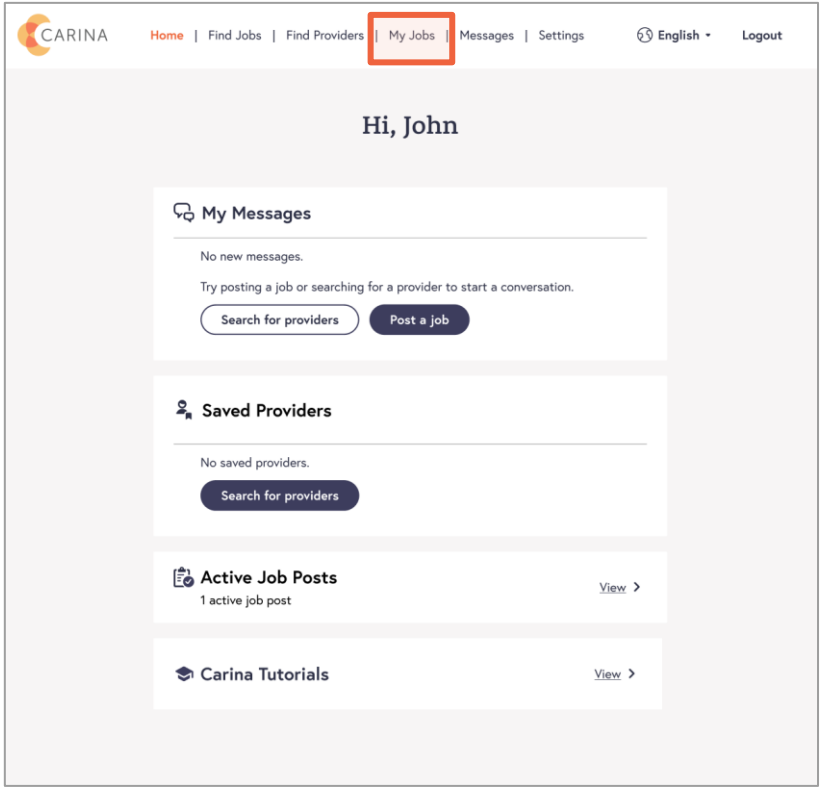
7. Share experience

Once everything is approved, the consumer should log back into Carina and let us know what happened by deleting the job post that was filled.

Go to “My Jobs”

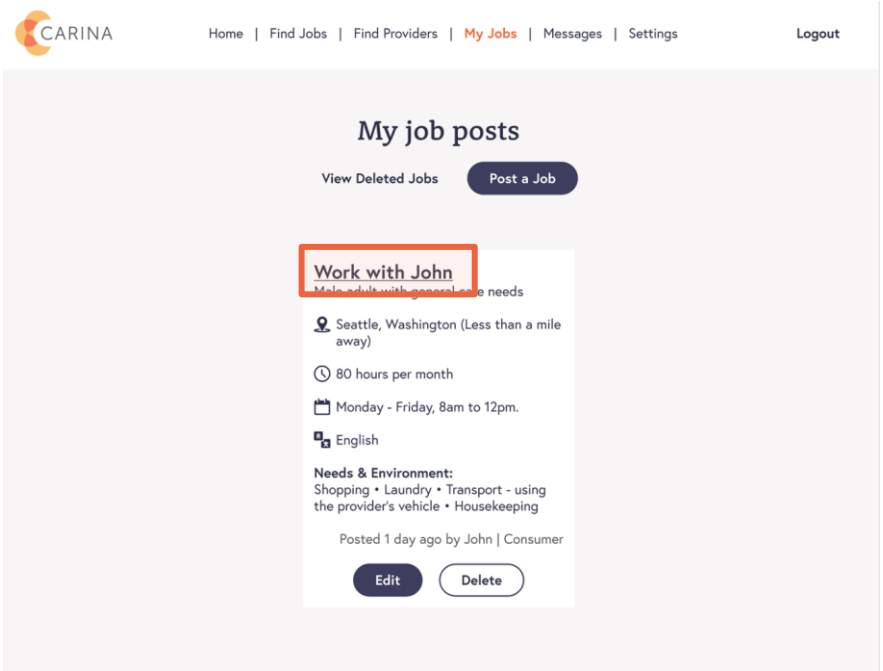
to view, edit, or delete your job post

The consumer should log in and go to “My Jobs” from the home page.



Select the job that was filled

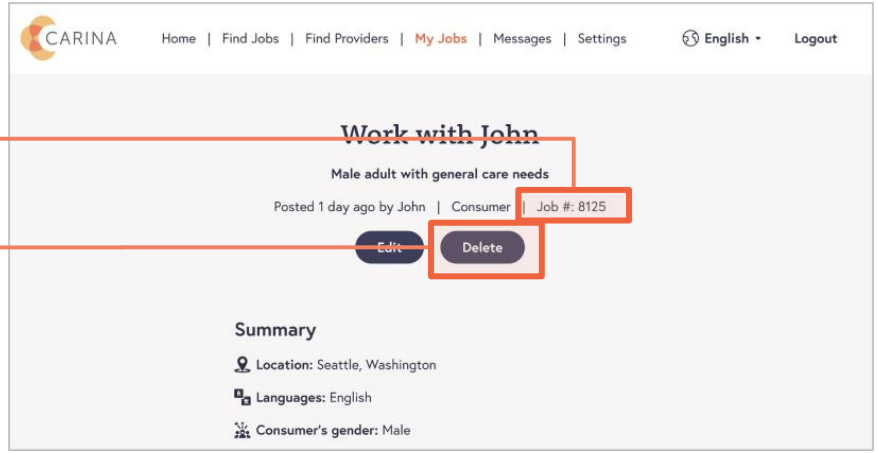
In My Jobs, select the job by clicking the title.



Click on “Delete”

to close your job post

1. Check that you are deleting the correct job by double checking the job number.
2. Once you’ve checked, click “Delete”.

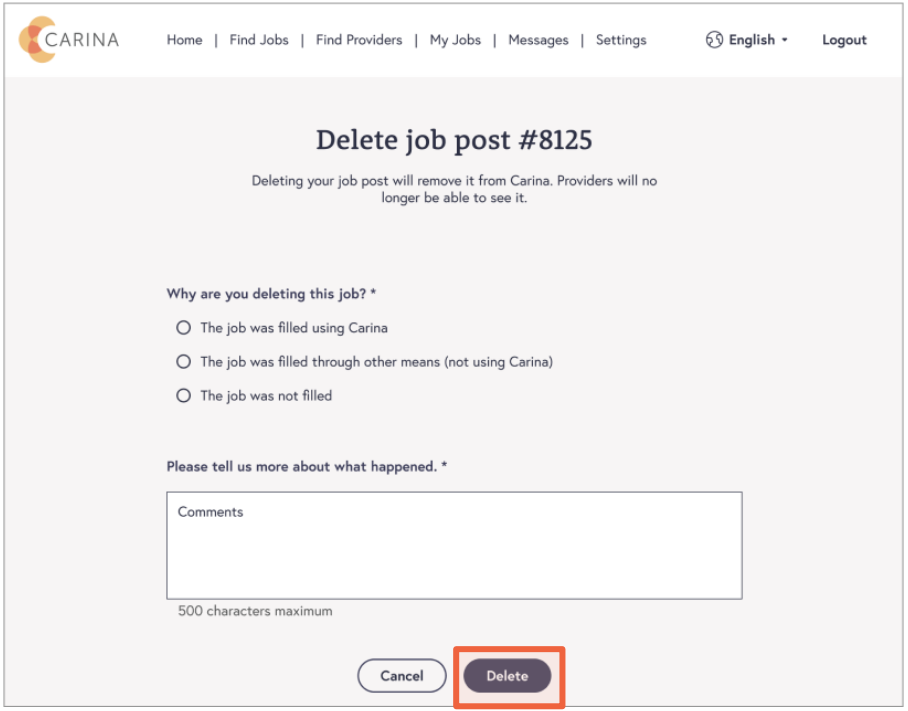


Fill out the form

to provide feedback

1. Tell us about your match and let us know about your experience connecting on Carina.

2. Once you are done, click “Delete”.



Consumer Experience Settings

Settings

There are 5 things users are able to do in settings:

1. Change password
2. Change email
3. Set up email notifications
4. Set up text notifications
5. Change address

You can get to settings from the top navigation.

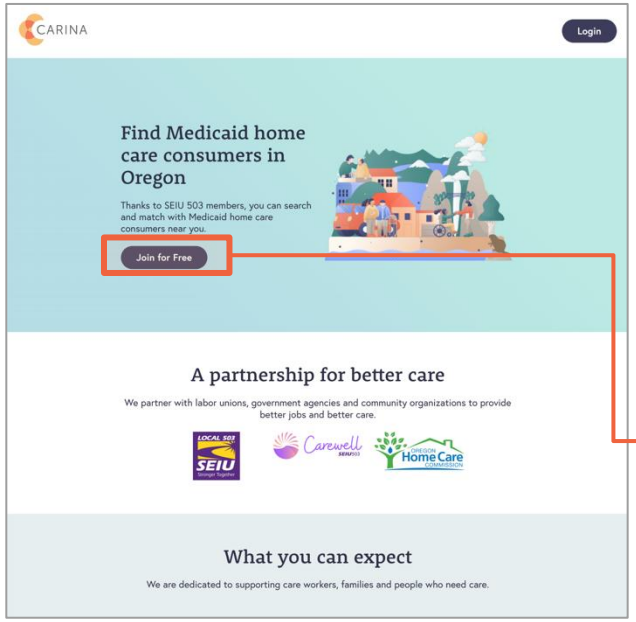
Section 6:
Provider Experience

Provider Experience

There are 7 primary steps for providers on Carina:

1. Navigate to the registration page from the Oregon landing page
2. Register, onboard, and create a profile
3. Search job postings and message a consumer
4. Learn more about a consumer and their job posting
5. Match!
6. Share experience
7. Update availability

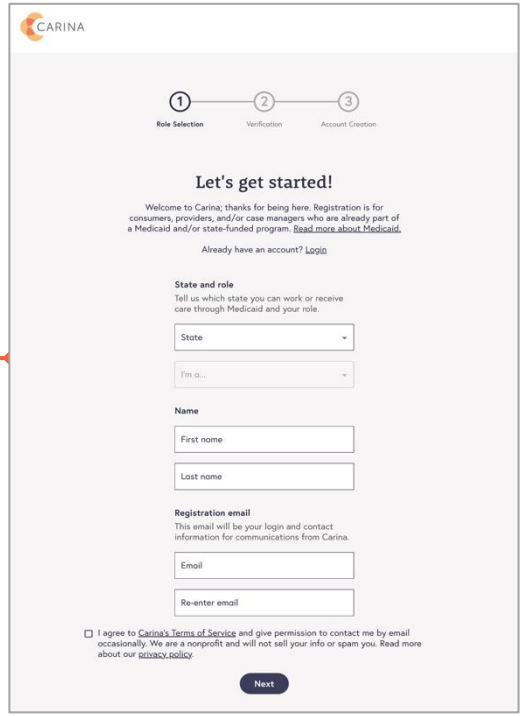
1. Navigate to the registration page



Oregon landing page

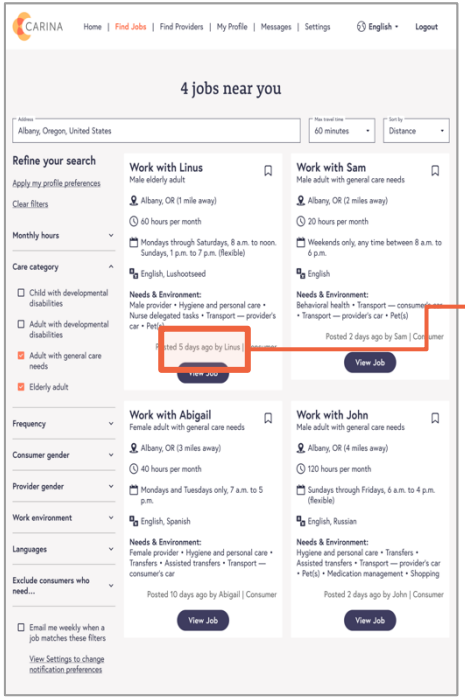
2. Register and Onboard

This step includes verification, account set up, onboarding process and profile creation

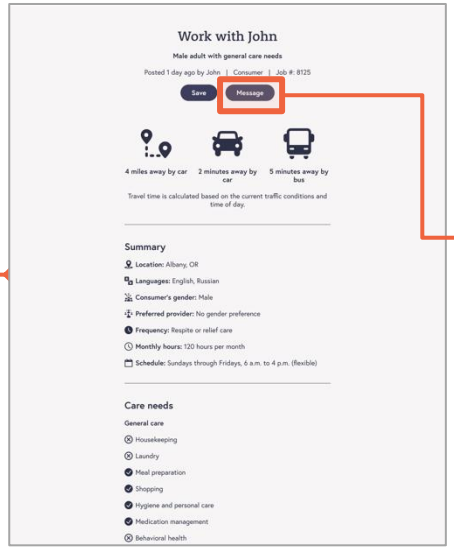


Registration page

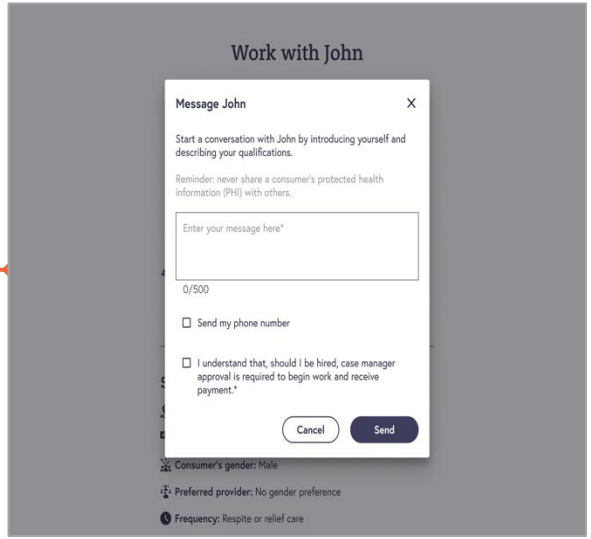
3. Search and message a consumer



Search page

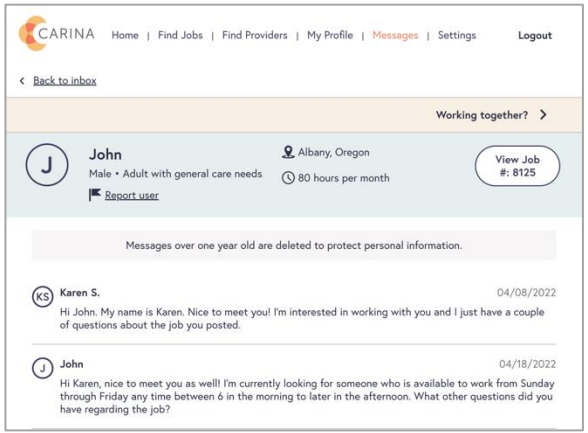


Job post page



Messaging form

4. Learn more about a



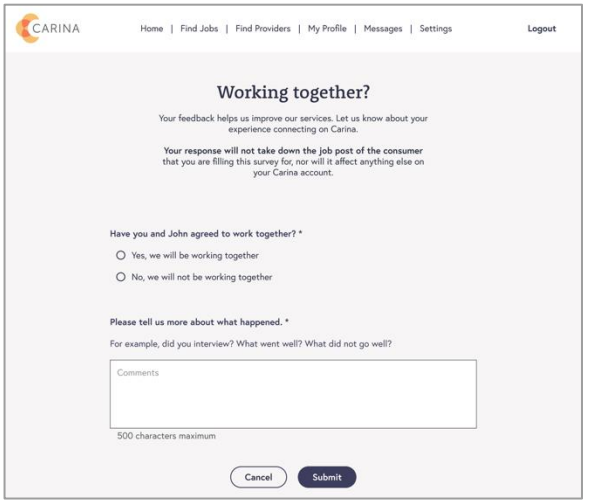
Messages

5. Match!

After the consumer speaks with the provider and decides to work together, the consumer must let the case manager know about the news.

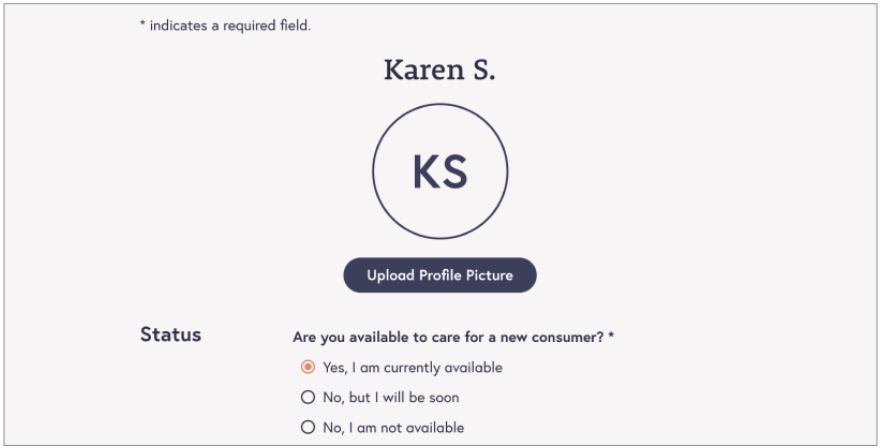
This step happens offline of Carina.

6. Share your experience



Match Survey form

7. Update availability

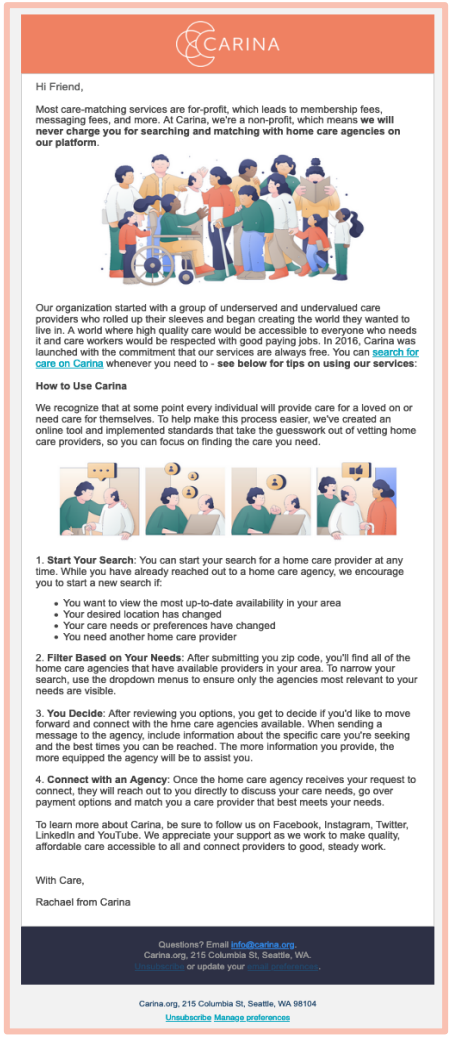


Edit Profile page

Ongoing Encouragement

for Providers

Once a provider registers their email on Carina, they are enrolled in email paths intended to support and encourage them toward successfully matching on Carina.



CARINA

Hi Friend,

Most care-matching services are for-profit, which leads to membership fees, messaging fees, and more. At Carina, we're a non-profit, which means **we will never charge you for searching and matching with home care agencies on our platform**.

Our organization started with a group of underserved and undervalued care providers who rolled up their sleeves and began creating the world they wanted to live in. A world where high quality care would be accessible to everyone who needs it and care workers would be respected with good paying jobs. In 2016, Carina was launched with the commitment that our services are always free. You can search for care on Carina whenever you need to - **see below for tips on using our services**:

How to Use Carina

We recognize that at some point every individual will provide care for a loved on or need care for themselves. To help make this process easier, we've created an online tool and implemented standards that take the guesswork out of vetting home care providers, so you can focus on finding the care you need.

1. **Start Your Search**: You can start your search for a home care provider at any time. While you have already reached out to a home care agency, we encourage you to start a new search if:

- You want to view the most up-to-date availability in your area
- Your desired location has changed
- Your care needs or preferences have changed
- You need another home care provider

2. **Filter Based on Your Needs**: After submitting you zip code, you'll find all of the home care agencies that have available providers in your area. To narrow your search, use the dropdown menus to ensure only the agencies most relevant to your needs are visible.

3. **You Decide**: After reviewing you options, you get to decide if you'd like to move forward and connect with the hme care agencies available. When sending a message to the agency, include information about the specific care you're seeking and the best times you can be reached. The more information you provide, the more equipped the agency will be to assist you.

4. **Connect with an Agency**: Once the home care agency receives your request to connect, they will reach out to you directly to discuss your care needs, go over payment options and match you a care provider that best meets your needs.

To learn more about Carina, be sure to follow us on Facebook, Instagram, Twitter, LinkedIn and YouTube. We appreciate your support as we work to make quality, affordable care accessible to all and connect providers to good, steady work.

With Care,

Rachael from Carina

Questions? Email info@carina.org.
Carina.org, 215 Columbia St, Seattle, WA.
Unsubscribe or update your email preferences.

Carina.org, 215 Columbia St, Seattle, WA 98104
Unsubscribe Manage preferences

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