



# Carina Care Matching Platform Oregon Pilot Project

---

Orientation & Reference Guide | April 7, 2023 (revised)

# Purpose

The **purpose** of this guide is to orient case managers to the Carina platform and covers the following:

- An overview of the Carewell Registry and Retention Project
- An overview of Carina and the different roles within the platform
- Specifics about the case manager role and how to request access
- An overview of the consumer and provider experiences
- How to get additional help and provide general feedback
- Security on Carina including how to report inappropriate behavior

# Table of Contents

<b>Section 1</b> – Project Overview .....	4
<b>Section 2</b> – About Carina .....	9
<b>Section 3</b> – Case Manager Access & Role .....	20
<b>Section 4</b> – Consumer Experience .....	81
<b>Section 5</b> – Provider Experience .....	122
<b>Section 6</b> – User Support & Feedback .....	129
<b>Section 7</b> – Security on Carina .....	132

# Section 1: Carewell Registry & Retention Project



# What is the purpose of this Project?

In 2017, the OHCC commissioned a report and workforce development strategic plan. Themes from that report include:

- 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 *current*).
- Strengthen workforce retention and sustainability by creating a pipeline for career opportunities and a pathway for credential advancements - understanding that the strength and viability of the workforce directly impact 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 with and a plan in place to support multiple languages in 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

# Carina Pilot & Next Steps

- Pilot – August through December 2022:
  - Clackamas, Lane, and Marion Counties participated in a 5-month pilot
  - 400+ providers participated
  - 250+ consumers participated
  - 16 matches were made!
- Current:
  - Rolling out to additional counties every 4-months through 2023
  - Communications will go out prior to launch in specific regions

# Section 2: About Carina



# 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.



# About Carina

## Who

We are a **technology non-profit organization** committed to prioritizing people first and strengthening communities.

Serve homecare services funded via Medicaid and private pay, as well as subsidized and out-of-pocket childcare.

## What

We offer a **safe and easy-to-use care matching service** for people in need of home care and childcare.

Our platform connects consumers with care professionals seeking good jobs and stable employment close to home.

## How

We **partner with organizations** such as - government agencies, employers, labor unions, and other community organizations.

Funded via program services contracts, collective bargaining agreements, and philanthropic grants.

# Watch Carina's Intro Video

## [Introduction to Carina](#)



# Carina 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 & Providers**



# Carina Roles: Consumers & 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
<b>Providers</b> Authorized care providers who deliver in-home and community-based services for consumers and who are seeking jobs	✓	✓	✓		✓	✓
<b>Consumers</b> Eligible participants of Oregon's Medicaid program who are seeking caregivers		✓		✓	✓	✓

# **Carina Platform Roles: Case Managers**

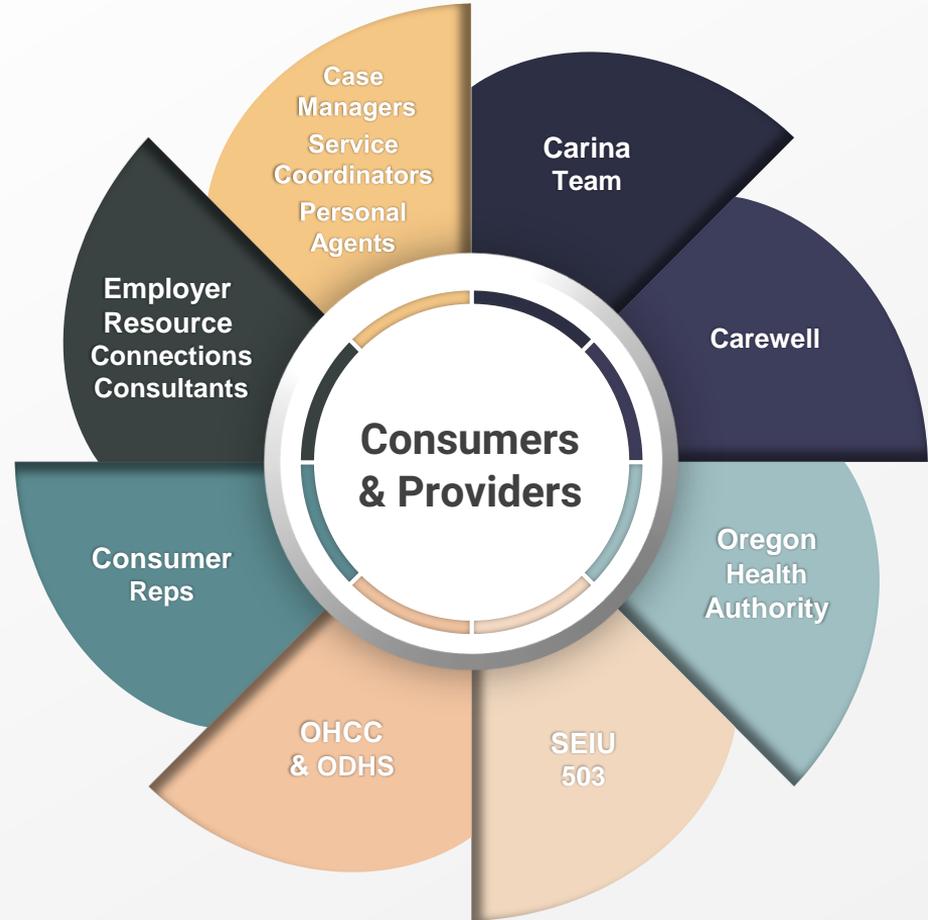
Includes case managers, personal agents, service coordinators, and other related positions



# 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
<b>Level 1 – Case Manager Access</b> Default level of access for those who support consumers.	✓	✓				
<b>Level 2 – Case Manager Access</b> Access is provided on an <b>as-needed basis</b> 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
- **Invite** them to join Carina to find the care they need and **encourage** them to use 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 and  
Overview of Platform Role**



# Registration & Video Tutorials Links

[Case Manager Registration Link](#)

[Tutorial Video – Case Manager Registration](#)

[Tutorial Video - Consumer Invitation](#)

# 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) During orientation, we will share a registration link with you.
- 3) After orientation, 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
- 7) Once your account is established you will receive an email with template language you can use to share Carina with consumers

# 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"



### Let's get started!

Welcome to Carina! Thank you for being here. Registration is for consumers, providers, and/or case managers who are already part of a Medicaid and/or state-funded program. [Read more about Medicaid.](#)

Already have an account? [Login](#)

#### State and role

Tell us which state you receive or provide Medicaid, Oregon Project Independence (OPI) or state-funded home care in and let us know your role.

State  
Oregon -

Role  
Case Manager -

#### Name

First name  
Ethan

Last name  
Testing

#### Registration email

This email will be used for your login and for communications from Carina.

Work Email

A valid email is required to sign up.

Re-enter work email

Must match email above

I agree to [Carina's Terms of Service](#) and give permission to Carina to contact me by email occasionally. We are a nonprofit and will not sell your personal information or spam you. Read more about our [privacy policy](#).

Next

# Registration

## Verification Step

- 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"



A horizontal progress bar with four steps: 1. Role Selection (checked), 2. Verification (current step), 3. Validate Token, and 4. Account Creation.

### Verification

Please complete this form so we can verify your information and send you a link to your work email so that you can complete your registration.

**Your information**

First name  
Ethan

Last name  
Testing

Work email  
testing@h.com

**Supervisor's information**

Please share your supervisor's information with us in case we have any difficulties reaching out to you.

Supervisor first name

Supervisor last name

Supervisor email

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.



## Check your work email

We have just sent you a link to your work email so that you can complete your registration. Be sure to check your spam folder.

If you have any questions or concerns, please do not hesitate to reach out to us at [1-855-796-0605](tel:1-855-796-0605) or [contactus@carina.org](mailto:contactus@carina.org).



# 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](mailto:carina@risepartnership.com) for additional assistance.



## Verification

Please complete this form so we can verify your information and send you a link to your work email so that you can complete your registration.

**!** We could not verify your work email.

Please double check that your work email is correct. Go back to the previous page to change it.

If it is correct, contact [carina@risepartnership.com](mailto:carina@risepartnership.com) about your access to Carina.

# 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.

### You've been invited to Carina!



From: <contactus@carina.org>

2023-03-28 16:10, 2 KB

To: <ethanistesting@carina.org>

[Show Headers](#)

HTML

HTML Source

Text

Raw

Spam Analysis

HTML Check

Tech Info



Hi Ethan,

You've been invited to create a Case Manager account on Carina. Please click this link to setup your Carina account.

[Click here to complete registration](#)

If you have any questions or concerns, please do not hesitate to reach out to us at [contactus@carina.org](mailto:contactus@carina.org). We're here to help!

All the best,  
Team Carina

Questions? Call 1-855-796-0605 or email [contactus@carina.org](mailto:contactus@carina.org).

Carina, 215 Columbia St, Seattle, WA

# Registration

## Set Password

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



Role Selection      Verification      Account Creation **3**

## Password

Create a password for this Carina account.

Please use 8 characters or more for your password.

Login email  
**ethan@kuhn1.com**

Password 

Re-enter password 

**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.

**Welcome to Carina!**

Please complete these quick and easy steps to improve your experience on Carina.

0% complete

  
**Agree to our community guidelines**

**Start**

1 min read time

# Onboarding

## Community Guidelines

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

### Community guidelines

Welcome to our community! To ensure that everyone on Carina has a positive experience, we ask that you follow our community guidelines.



#### Be safe

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



#### Be responsive and professional

Please respond quickly to messages, and do not use unprofessional, discriminatory, inappropriate or abusive language.



#### Be approved

Remember there must be authorization from the consumer's case manager before care and payment for services can begin.



#### Be proactive

Once you have made a match, let us know so we can improve our services and measure our impact.



#### Be informed

Carina is a self-service tool to connect for care. It is not a guarantee of work or care.

We reserve the right to remove a user who violates our guidelines or terms of service.

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”

**Hooray! Your account is set up!**

Now that you've set up your account, click the button below to access your account and view job posts and providers on Carina.

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 home page also has your consumer invite link and a tutorial for later reference.

The screenshot shows the Carina account home page for a user named Alex. At the top, there is a navigation bar with links for Home, Find Providers, and Find Jobs. Below the navigation bar, the user is greeted with "Hi Alex". The page is divided into four main sections, each with a "View" link and a search button:

- Saved Job Posts:** Only jobs that are actively recruiting are shown. Inactive jobs are not shown. No saved job posts. Search for jobs button.
- Saved Providers:** No saved providers. Search for providers button.
- Consumer Invite link:** Share this link with your consumers so that they can register on Carina. The link is `http://localhost:3000/homecare/medicaid/oregon/OREGON_6342?utm_source=` and expires on 05/26/2023. Buttons for "Copy invite link" and "Generate new link" are present.
- Carina Tutorials:** A link to view tutorials.

# 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.

The screenshot shows the Carina account home page for a user named Susan. The page has a navigation bar at the top with links for Home, Find Jobs, Find Providers, My Jobs, and Messages. The main content area is titled "Hi, Susan" and contains several sections:

- My Messages:** A section with a "View" link and a "No new messages." status. It includes a prompt to "Try posting a job or searching for a provider to start a conversation." and two buttons: "Search for providers" and "Post a job".
- Active Job Posts:** A section with a "View" link and a "No active job posts." status. It includes a "Post a job" button.
- Saved Providers:** A section with a "View" link and a "No saved providers." status. It includes a "Search for providers" button.
- Consumer invite link:** A section with a "View" link and a "Share this link with your consumers so that they can register on Carina" prompt. It displays a link: `https://www.carina.org/homecare/medicaid/oregon/OREGON_3809` and a "Link expiration: 05/02/2023" notice. It includes "Copy invite link" and "Generate new link" buttons.
- Carina Tutorials:** A section with a "View" link.

Two orange arrows point to the "My Messages" and "Active Job Posts" sections, highlighting the user's ability to message providers and post jobs on behalf of consumers.

# Two Important Things Happen Next

Once your account is set up:

- 1) **Your first consumer invitation link is automatically generated in your account.** This is found at the bottom of your account page and can be copied to share with consumers.
- 2) This consumer invitation link is also **automatically included in an email that is sent to your work e-address along with language that you can use when sharing with consumers.** You can copy and paste the content of this email into a separate one and share it with consumers, or you can forward this email directly to consumers (just remember to delete the first part before sending it).

# Consumer Link

## Generate Invite

- Once you have access to your account, scroll down to the bottom portion of your home page where you will find the consumer invite link.
- This link is automatically generated when you create your account and is active for 60-days.
- You can copy this link to share with consumers who are eligible for Medicaid and OPI.



Home | Find Providers | Find Jobs

Hi Alex

**Saved Job Posts** [View >](#)  
Only jobs that are actively recruiting are shown. Inactive jobs are not shown.

No saved job posts.

[Search for jobs](#)

**Saved Providers** [View >](#)

No saved providers.

[Search for providers](#)

**Consumer Invite link**  
Share this link with your consumers so that they can register on Carina

Link  
`http://localhost:3000/homecare/medicaid/oregon/OREGON_6342?utm_source=`

Link expiration: 05/26/2023

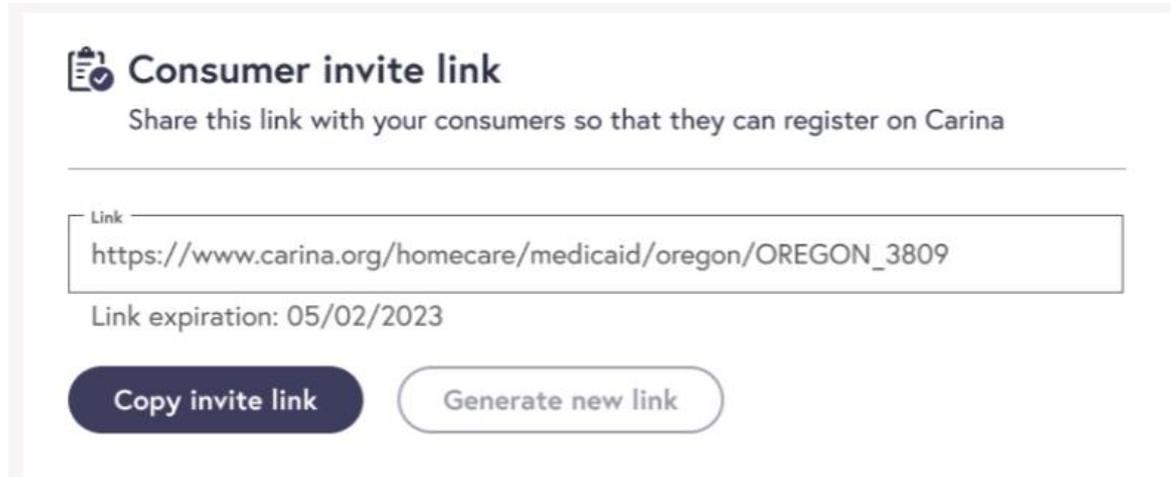
[Copy invite link](#) [Generate new link](#)

**Carina Tutorials** [View >](#)

# Consumer Invite Link

## Generate invitation link

- Click on the “Copy invite link” to share with consumers.



The screenshot shows a user interface for generating a consumer invite link. At the top left is a clipboard icon with a checkmark. The main heading is "Consumer invite link" in bold. Below it is the instruction "Share this link with your consumers so that they can register on Carina". A horizontal line separates this from a text input field labeled "Link" containing the URL "https://www.carina.org/homecare/medicaid/oregon/OREGON\_3809". Below the input field, the text "Link expiration: 05/02/2023" is displayed. At the bottom, there are two buttons: a dark blue button with white text labeled "Copy invite link" and a white button with a dark blue border and dark blue text labeled "Generate new link".

**Consumer invite link**  
Share this link with your consumers so that they can register on Carina

Link  
[https://www.carina.org/homecare/medicaid/oregon/OREGON\\_3809](https://www.carina.org/homecare/medicaid/oregon/OREGON_3809)

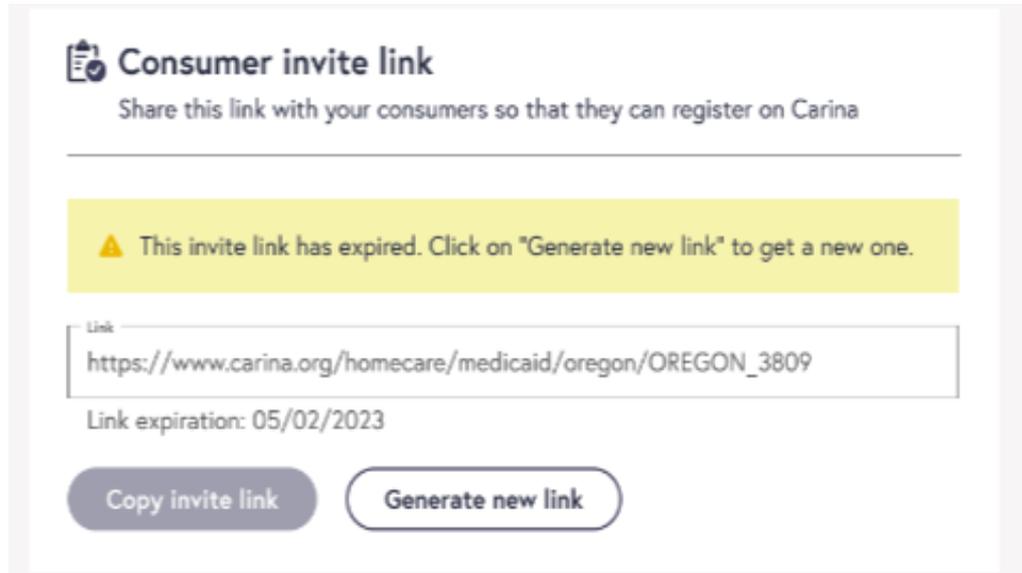
Link expiration: 05/02/2023

**Copy invite link**    Generate new link

# Consumer Invite Link

## Generate new consumer invite link

- After the initial consumer invite link expires, you will need to generate a new one by clicking on the “Generate new link” button.



**Consumer invite link**  
Share this link with your consumers so that they can register on Carina

**⚠ This invite link has expired. Click on "Generate new link" to get a new one.**

Link  
[https://www.carina.org/homecare/medicaid/oregon/OREGON\\_3809](https://www.carina.org/homecare/medicaid/oregon/OREGON_3809)

Link expiration: 05/02/2023

**Copy invite link** **Generate new link**

# Consumer Email

## Template language

- After your account is set up, Carina will send you an email that contains template language and your first consumer invitation link.
- This link is also available on your account home page.
- The first part explains how to use the consumer invitation (verification) link and how to use the email language further down.

**From:** <[contactus@carina.org](mailto:contactus@carina.org)>

**Date:** Friday, March 24, 2023 at 9:32 AM

**To:** <[kelly@carina.org](mailto:kelly@carina.org)>

**Subject:** New Care Matching Tool Now Available!

Dear Kelly,

Thank you for registering on Carina!

The email template below includes a verification link and code for new consumers to join Carina. Please use it to invite home care consumers who participate in Medicaid or Oregon Project Independence Consumers to join Carina. This link expires after 60 days, if you need to generate a new link for the home care consumers you work with, log into your Carina account to generate a new one.

If you have questions on this process, do not hesitate to call us at 1-855-796-0605 or email us through this [contact form](#).

If you forward this email, please be sure to delete everything above the line, or copy and paste everything below this line into a new email.

---

# Consumer Email

## Template language

- The second part of this email contains the text you can forward to consumers – be sure to delete the first part of the email which is just intended for you.
- You can also cut and paste this language into a separate email and share it with consumers.
- In the future, you will need to replace the invitation link once it has expired (which you can do from your account).

---

Hello!

I am happy to share that Carina, a free care matching service that helps people quickly find homecare providers, is now available as an option for you to find care today!

To get started on Carina, click on this link and click "Join for free" to register: [https://dev.carina.org/homecare/medicaid/oregon/OREGON\\_6660](https://dev.carina.org/homecare/medicaid/oregon/OREGON_6660)

These links cannot be shared and will expire. If this link is no longer valid, please reach out for a new one.

**Step 1 - Role Selection:** Enter your name, email, and agree to Carina's Terms of Service.

**Step 2 - Verification:** Confirm your name and verification code.

**Step 3 - Account Creation:** Create a password for your Carina account.

Congratulations! You have successfully registered on Carina! After you agree to Carina's community guidelines and set up your notifications, you can start to search, message, and match with providers. Get approval from your case manager before you start working with your new provider.

### Want to know more about Carina?

Carina is a user-friendly website where individuals and families who are looking for care can easily match with homecare providers that meet their needs. This is a new and optional tool for all Oregon Project Independence (OPI) consumers. Carina has partnered with the Oregon Department of Human Services, Oregon Home Care Commission, Carewell SEIU 503, and SEIU Local 503 to develop an effective online care matching tool that meets the needs of OPI consumers across Oregon. Check out Carina's FAQs to learn more!

### Need help getting started?

Send a request for support or a question to Carina through this [contact form](#).

Call Carina at 1-855-796-0605 between 8 a.m. - 6 p.m. (Monday to Friday)

# 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.

# 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 the care they need, we are asking that you:

- **Become familiar** with Carina
- **Introduce** consumers and family members to Carina – **share the consumer invite link and email** with them
- **Encourage** them to use Carina to find the care they need
- **Share your feedback** along the way so we can work together effectively and ensure people are getting what they need

# Registration & Video Tutorials Links

[Case Manager Registration Link](#)

[Tutorial Video – Case Manager Registration](#)

[Tutorial Video - Consumer Invitation](#)

# 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
<b>Level 1</b> - Default level of access for those who support consumers.	✓	✓				

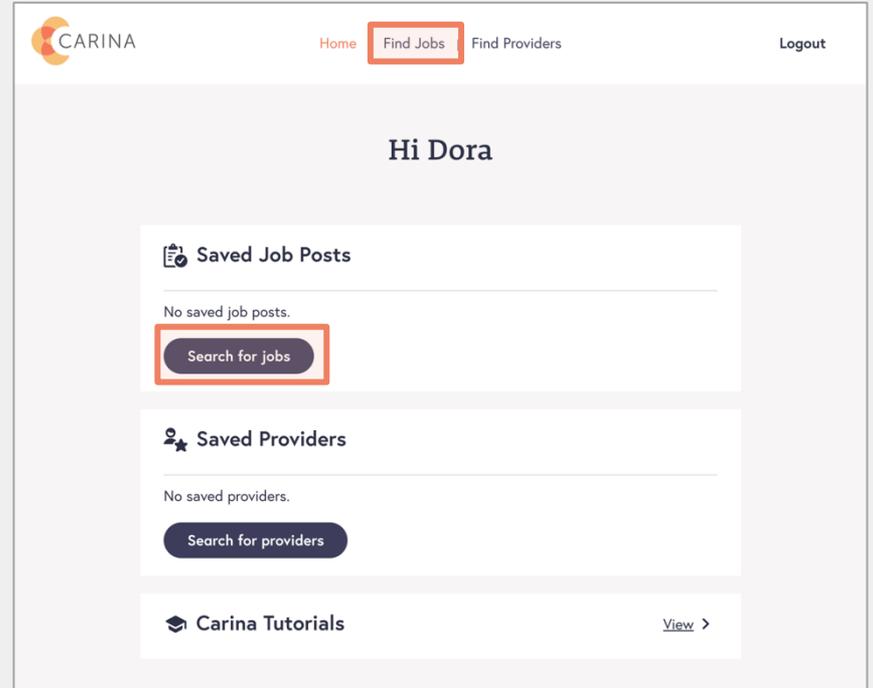
# 1. View Jobs

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

# Click “Find Jobs”

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

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"**.

Note: The Sort by **Join Date** (top right) means the results will be listed by job posts that are the newest or the most recently updated.

The screenshot displays the CARINA website interface. At the top, there is a navigation bar with the CARINA logo, links for Home, Find Jobs, Find Providers, and Logout. Below the navigation bar, the text "4 jobs near you" is centered. A search bar contains the address "215 Columbia Street, Seattle, WA 98104". To the right of the search bar, there are two dropdown menus: "Max travel time" set to "60 minutes" and "Sort by" set to "Distance".

On the left side, there is a "Refine your search" section with a "Clear filters" link. Below this, there are several filter categories, each with a dropdown arrow: "Monthly hours" (highlighted with a red box), "Care category", "Frequency", "Consumer gender", "Provider gender", "Work environment", "Languages", and "Exclude consumers who need...". The "Monthly hours" filter is expanded, showing four options: "Less than 40 hours per month", "40 - 79 hours per month" (selected with a red circle), "80 - 119 hours per month", and "More than 120 hours per month". At the bottom of the filter section, there is a checkbox for "Email me weekly when a job matches these filters" and a link to "View Settings to change notification preferences".

On the right side, there are four job preview cards. Each card includes the job title, provider name, location, hours per month, schedule, languages, and needs & environment. The "View Job" button for the "Work with Sam" job is highlighted with a red box.

- Work with Kevin**: Male adult with general care needs. Seattle, Washington (1 mile away). 60 hours per month. Mondays through Saturdays, 8 a.m. to noon. Sundays, 1 p.m. to 7 p.m. (flexible). English, Lushootseed. Needs & Environment: Male provider • Hygiene and personal care • Nurse delegated tasks • Transport — provider's car • Pet(s). Posted 5 days ago by Linus | Consumer. View Job.
- Work with Sam**: Male adult with general care needs. Seattle, Washington (2 miles away). 45 hours per month. Weekends only, any time between 8 a.m. to 6 p.m. English. Needs & Environment: Behavioral health • Transport — consumer's car • Transport — provider's car • Pet(s). Posted 2 days ago by Sam | Consumer. View Job.
- Work with Abigail**: Female adult with general care needs. Seattle, Washington (3 miles away). 40 hours per month. Mondays and Tuesdays only, 7 a.m. to 5 p.m. English, Spanish. Needs & Environment: Female provider • Hygiene and personal care • Transfers • Assisted transfers • Transport — consumer's car. Posted 10 days ago by Abigail | Consumer. View Job.
- Work with John**: Male adult with general care needs. Seattle, Washington (4 miles away). 50 hours per month. Sundays through Fridays, 6 a.m. to 4 p.m. (flexible). English, Russian. Needs & Environment: Hygiene and personal care • Transfers • Assisted transfers • Transport — provider's car • Pet(s) • Medication management • Shopping. Posted 2 days ago by John | Consumer. View Job.

# View job post

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.

## Work with John

Male adult with general care needs

Posted 2 days ago by John | Consumer | Job #: 8125

**Save**

 4 miles away by car    3 minutes by car    No route available

Travel time is calculated based on the current traffic conditions and time of day.

---

### Summary

 Location: Albany, OR

 Languages: English, Russian

 Consumer's gender: Male

 Preferred provider: No gender preference

 Frequency: Respite or relief care

 Monthly hours: 120 hours per month

 Schedule: Sundays through Fridays, 6 a.m. to 4 p.m. (flexible)

---

### Care needs

General care

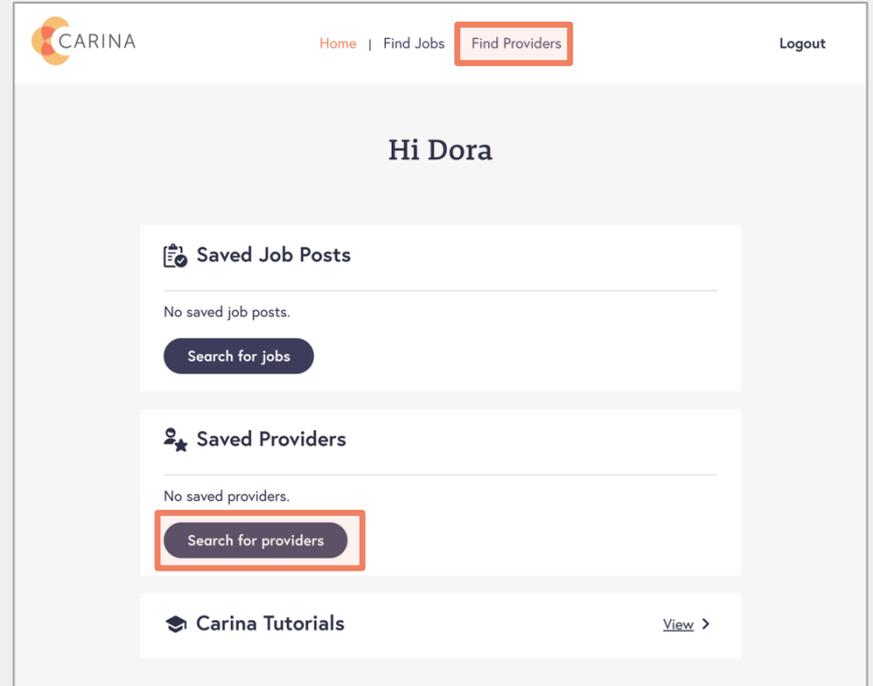
- Housekeeping
- Laundry
- Meal preparation
- Shopping
- Hygiene and personal care

## 2. View Providers

Level 1 Case Managers are also able to view provider profiles 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

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"**.

The screenshot displays the CARINA website interface. At the top, there are navigation links for Home, Find Jobs, Find Providers, and Logout. The main heading reads "4 providers near you". Below this is an address field containing "215 Columbia Street, Seattle, WA 98104". To the right of the address field are two dropdown menus: "Max travel time" set to "60 minutes" and "Sort by" set to "Distance".

On the left side, there is a "Refine your search" section with a "Clear filters" link. The filters are as follows:

- Provider availability:** Radio buttons for "Available now" (selected), "Available soon", and "Not available".
- Monthly hours:** A dropdown menu.
- Care category:** A dropdown menu.
- Frequency:** A dropdown menu.
- Consumer gender:** A dropdown menu.
- Provider gender:** A dropdown menu.
- Languages:** A dropdown menu.
- I need...:** A dropdown menu.

At the bottom of the filter section, there is a checkbox for "Email me weekly when a provider matches these filters" and a link to "View Settings to change notification preferences".

The main content area shows four provider profiles:

- Evelyn M.:** Female provider, Available Now. Location: Seattle, Washington (1 mile away). Hours: 160 hours per month. Schedule: Mondays through Fridays, generally any time is negotiable from mornings to evenings. (flexible). Languages: English, Russian. Skills & Preferences: Hygiene and personal care, Behavioral health, Pet(s). Last updated 10 days ago. View Profile button.
- George M.:** Male provider, Available Now. Location: Seattle, Washington (1 mile away). Hours: 80 hours per month. Schedule: Monday through Friday, 1 p.m. to 7 p.m. (flexible). Languages: English, Russian. Skills & Preferences: Hygiene and personal care, Nurse delegated tasks, Transfers, Pet(s). Last updated 5 days ago. View Profile button.
- Karen R.:** Female provider, Available Now. Location: Seattle, Washington (1 mile away). Hours: 120 hours per month. Schedule: Sundays through Fridays, 8 a.m. to 4 p.m. (flexible). Languages: English, Spanish. Skills & Preferences: Housekeeping, Laundry, Hygiene and personal care, Transfers, Assisted transfers, Transport — provider's car, Pet(s), Medication management, Shopping. Last updated 10 days ago. View Profile button.
- Kevin W.:** Male provider, Available Now. Location: Seattle, Washington (4 miles away). Hours: 120 hours per month. Schedule: Mondays through Saturdays, 10 a.m. to 3 p.m. (flexible). Languages: English, Spanish. Skills & Preferences: Hygiene and personal care, Transfers, Assisted transfers, Transport — client's car, Transport — provider's car. Last updated 3 days ago. View Profile button.

# 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.

The screenshot shows the CARINA website interface for a provider profile. At the top, the CARINA logo is on the left, and navigation links for Home, Find Jobs, Find Providers, and Logout are on the right. The profile features a circular avatar with the initials 'KR' and the name 'Karen R.'. Below the name, two job categories are listed: 'Home Care Worker (HCW)' and 'Personal Support Worker (PSW)'. The status 'Available Now' and 'Updated 10 days ago' is shown. A 'Save' button is highlighted with a red border. Below this, three icons represent travel options: a location pin icon for '1 mile away by car', a car icon for '0 minutes by car', and a bus icon for 'No route available'. A note states that travel time is calculated based on current traffic conditions and time of day. A 'Summary' section at the bottom lists: Location: Seattle, WA; Languages: English, Spanish; and Provider's gender: Female.

# 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](mailto: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
<b>Level 2 - Case Manager</b> Access provided on an <b>as-needed basis</b> to those who actively help a consumer find a care provider. (ex. Case Managers on the DD side)	✓	✓		✓	✓	

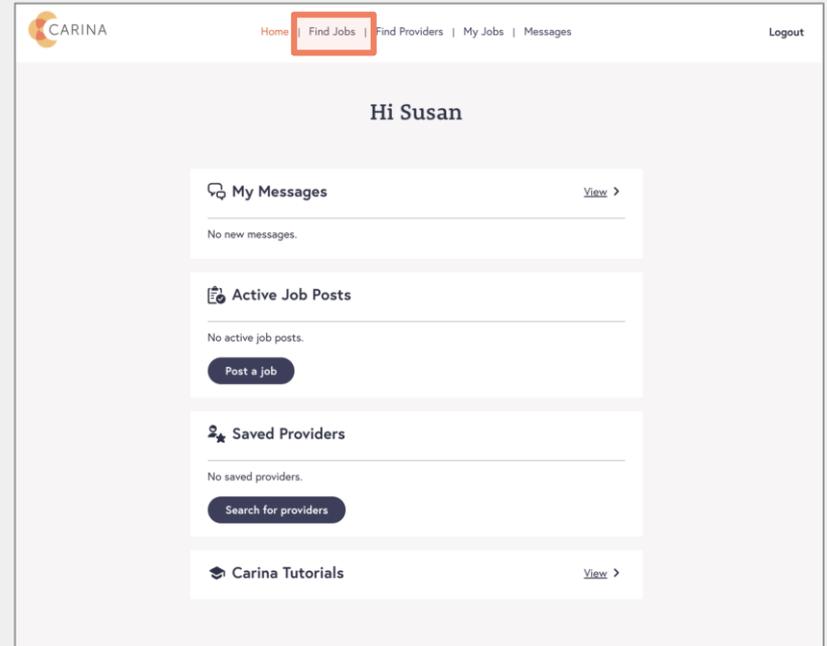
# 1. View Jobs

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

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"**.

The screenshot displays the CARINA website interface. At the top, there is a navigation bar with the CARINA logo, a home icon, and links for 'Home', 'Find Jobs', 'Find Providers', 'My Jobs', 'Messages', and 'Logout'. Below the navigation bar, the main heading reads '4 jobs near you'. A search bar is present with the address 'Portland, Oregon 97218, United States'. To the right of the search bar, there are two dropdown menus: 'Max travel time' set to '30 minutes' and 'Sort by' set to 'Distance'. On the left side, there is a 'Refine your search' section with a 'Clear filters' link and several filter categories, each with a dropdown arrow: 'Monthly hours', 'Care category', 'Frequency', 'Consumer gender', 'Provider gender', 'Work Environment', 'Languages', and 'Exclude consumers who need...'. The main content area displays four job listings. The first listing is 'Work with Kat', a child with developmental disabilities, located in Portland, Oregon (7 miles away), with 160 hours per month, 000 (flexible) hours, and English spoken. The second listing is 'Work with Serio', an adult with general care needs, located in Gresham, Oregon (13 miles away), with 100 hours per month, weekend 6-10, and English spoken. The third listing is 'Work with Billy', an older adult, located in Gresham, Oregon (13 miles away), with 100 hours per month. The fourth listing is 'Work with Mac', an adult with general care needs, located in Beaverton, Oregon (16 miles away), with 160 hours per month (flexible). Each listing includes a 'View Job' button and a 'Message' button. The 'View Job' and 'Message' buttons for the 'Work with Serio' listing are highlighted with a red box.

# 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.

The screenshot shows the CARINA website interface. At the top, there is a navigation bar with the CARINA logo on the left and links for Home, Find Jobs, Find Providers, My Jobs, Messages, and Logout on the right. The main content area features a job post titled "Work with Mary" with the subtitle "Adult with general care needs". Below the title, it states "Posted 31 days ago by Mary | Consumer | Job #: 800062". There are two buttons: "Save" and "Message".

**Summary**

- Location: Portland, Oregon
- Languages: German, English
- Consumer's gender: Female
- Preferred provider's gender: No gender preference
- Frequency: Routine care
- Monthly hours: 20 (flexible)
- Schedule: M-F 3-9pm (flexible)

**Care needs**

**General care**

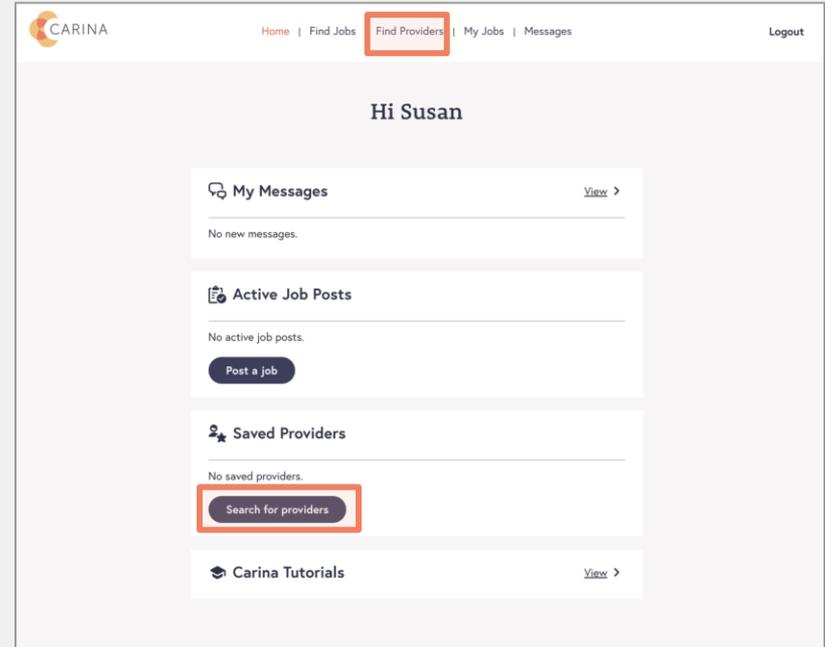
- Housekeeping
- Laundry
- Meal preparation
- Shopping

## 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.



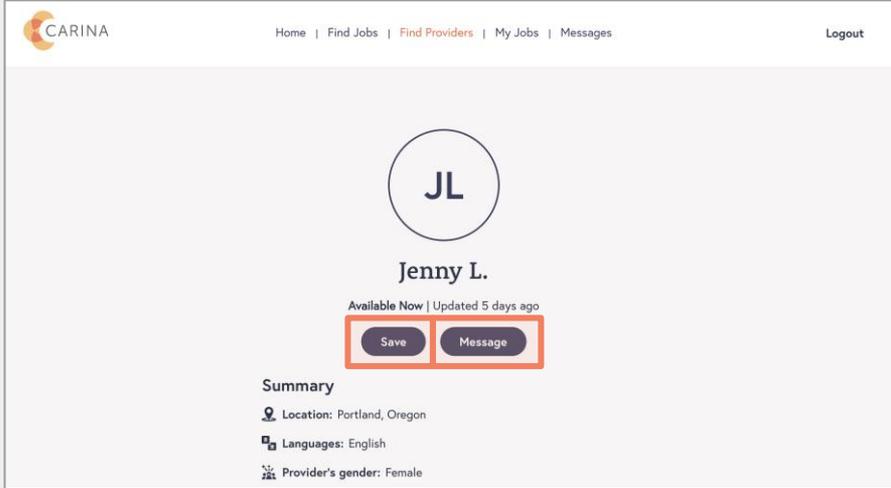
# Filter, sort, and search

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"**.

The screenshot shows the CARINA website interface. At the top, there is a navigation bar with links for Home, Find Jobs, Find Providers, My Jobs, Messages, and Logout. The main heading is "4 providers near you". Below this, there is a search bar with the address "Portland, Oregon, United States". To the right of the search bar, there are two dropdown menus: "Max travel time" set to "30 minutes" and "Sort by" set to "Distance". On the left side, there is a "Refine your search" section with a "Clear filters" link and several filter categories: Provider availability, Monthly hours, Care category, Frequency, Consumer gender, Provider gender, Languages, and I need... Each filter category has a dropdown arrow. The main content area displays four provider profiles. Each profile includes the provider's name, gender, availability status, location, and contact options. The "View Profile" and "Message" buttons are highlighted with red boxes. The profiles are: Matt R. (Male Provider, Available Now, Portland, Oregon (Less than a mile away), 10 hours per month, m-f, English, Last updated 10 days ago), Michael T. (Male Provider, Available Now, Portland, Oregon (Less than a mile away), 50 hours per month, Monday through Wednesday, 12pm to 5pm, English, Spanish, Last updated 20 days ago), Jenny F. (Female Provider, Available Now, Portland, Oregon (2 miles away), 100 hours per month), and Karen R. (Female Provider, Available Now, Portland, Oregon (5 miles away), 100 hours per month (flexible)).

# 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.
3. To message the provider, click **"Message"**.



The screenshot shows the CARINA website interface. At the top, there is a navigation bar with the CARINA logo on the left and links for Home, Find Jobs, Find Providers, My Jobs, Messages, and Logout on the right. The main content area displays a provider profile for Jenny L. The profile includes a circular avatar with the initials 'JL', the name 'Jenny L.', and a status 'Available Now | Updated 5 days ago'. Below this, there are two buttons: 'Save' and 'Message', both highlighted with a red border. Underneath the buttons is a 'Summary' section with three items: 'Location: Portland, Oregon', 'Languages: English', and 'Provider's gender: Female'.

## 3. Create Job Posts

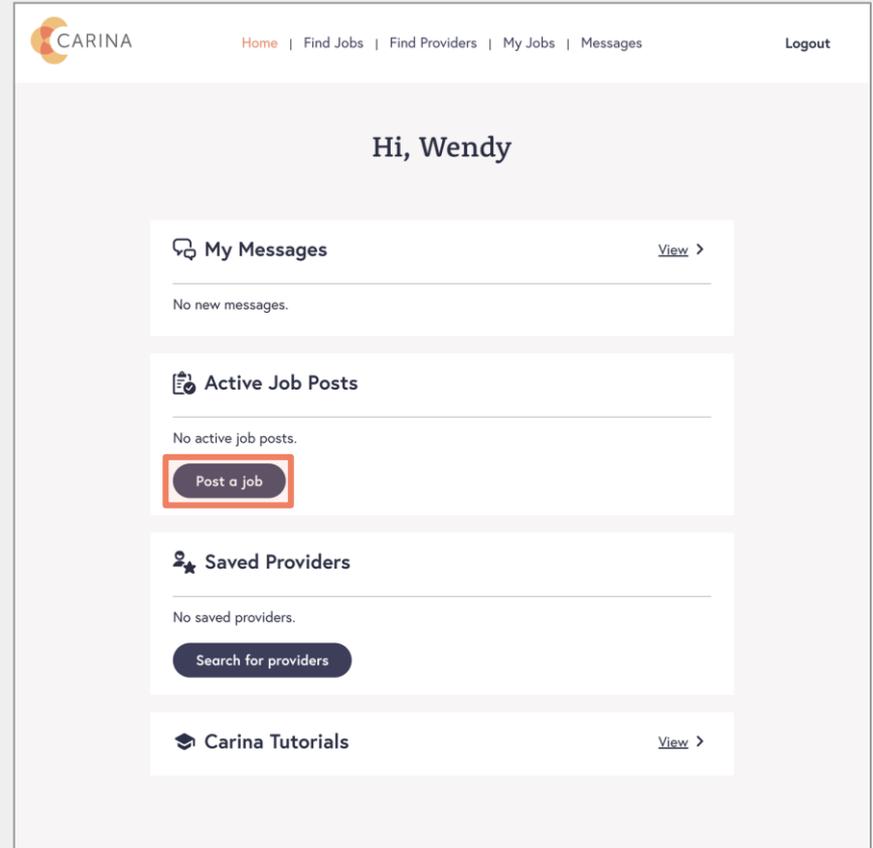
Level 2 Case Managers will be able to create job posts for consumers.

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”**.



# Click “Post a Job”

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

The image displays two screenshots of the CARINA website interface. The top screenshot shows the user's profile page for 'Wendy', with the 'My Jobs' menu item highlighted in the top navigation bar. A red line indicates the path from 'My Jobs' to the 'My job posts' page shown in the bottom screenshot. In the 'My job posts' page, the 'Post a Job' button is highlighted with a red box. The bottom screenshot also shows the footer with various links and social media icons.

**Top Screenshot (Profile Page):**

- Navigation: Home | Find Jobs | Find Providers | **My Jobs** | Messages | Logout
- Greeting: Hi, Wendy
- My Messages: No new messages. [View >]
- Active Job Posts: No active job posts. [Post a job]
- Saved Providers: No saved providers. [Search for providers]
- Carina Tutorials

**Bottom Screenshot (My job posts page):**

- Navigation: Home | Find Jobs | Find Providers | **My Jobs** | Messages | Logout
- Section: My job posts
- Buttons: [View Deleted Jobs] [Post a Job]
- Text: You currently do not have any active job posts.

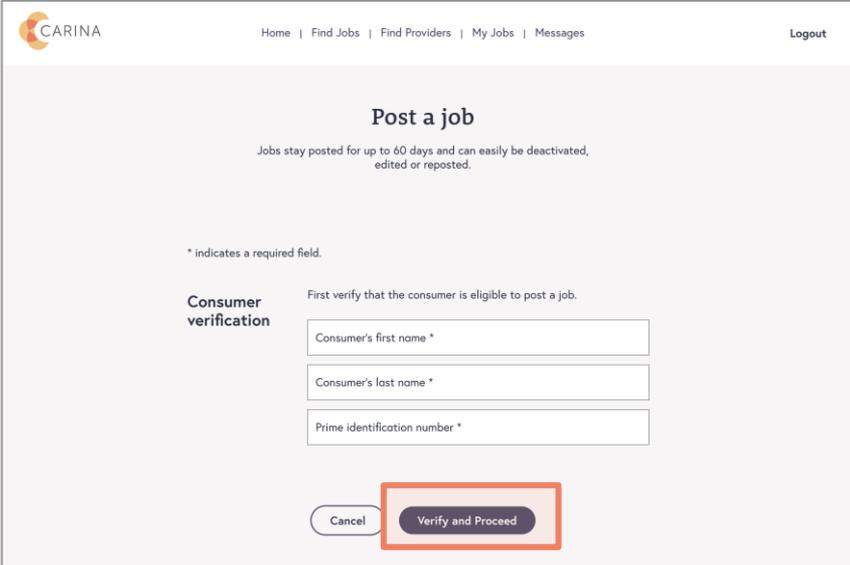
**Footer:**

- Find Home Care | Privacy Policy
- Find Child Care | Terms of Service
- Provide Care | Need help? 1-855-776-0605
- About Carina
- Social media icons: Facebook, LinkedIn, YouTube, Twitter, Instagram
- © 2022 Carina. All rights reserved.

# 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 Prime Number
3. Once this is complete, click **“Verify and Proceed”**.



The screenshot shows the CARINA user interface for posting a job. At the top, there is a navigation bar with the CARINA logo on the left and links for Home, Find Jobs, Find Providers, My Jobs, Messages, and Logout on the right. The main heading is "Post a job", followed by a note: "Jobs stay posted for up to 60 days and can easily be deactivated, edited or reposted." Below this is a legend: "\* indicates a required field." The section is titled "Consumer verification" and includes the instruction: "First verify that the consumer is eligible to post a job." There are three input fields: "Consumer's first name \*", "Consumer's last name \*", and "Prime identification number \*". At the bottom, there are two buttons: "Cancel" and "Verify and Proceed". The "Verify and Proceed" button is highlighted with a red rectangular border.

# Post a Job

## Fill out the form

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

### Post a job

Let care providers know that you're hiring by posting a job. Jobs stay posted for up to 60 days and can easily be deleted, edited or reposted.

\* indicates a required field.

#### General Information

Notes

500 characters maximum

Consumer's name \*

John

This name (or nickname) will be displayed on your job post.

Care category \*

Consumer's gender \*

Preferred provider gender \*

Languages \*

#### Schedule

Frequency of care \*

Available monthly hours \*

This is the number of hours you need a care provider to fill.

These hours are flexible

Care schedule (days and times) \*

Example: Monday and Wednesday from 1 p.m. – 5 p.m.

100 characters maximum

These days and times are flexible

#### Care needs

What tasks would you like help with? (Check all that apply)

##### General Care

- Housekeeping
- Laundry
- Meal preparation
- Shopping
- Hygiene & personal care

- Medication management
- Behavioral health
- LGBTQIA+ home care
- Nurse delegated tasks

#### Movement

- Mobility assistance (ambulation)
- Positioning
- Transfers
- Assisted transfers (using Hoyer Lift, etc.)

#### Transportation

- Transport - using the consumer's vehicle
- Transport - using the provider's vehicle

---

#### Home environment

(Check all that apply)

##### Scents and smoking preferences

- Fragrance-free home
- Non-smoking home
- Smoking home
- I prefer a non-smoking provider

##### My pets

- Dog(s)
- Cat(s)
- Bird(s)
- Other pet(s)

---

#### Personality

Hobbies, interests, vaccination status and other information

Example: singing, watching movies, painting, etc.

200 characters maximum

---

#### Location

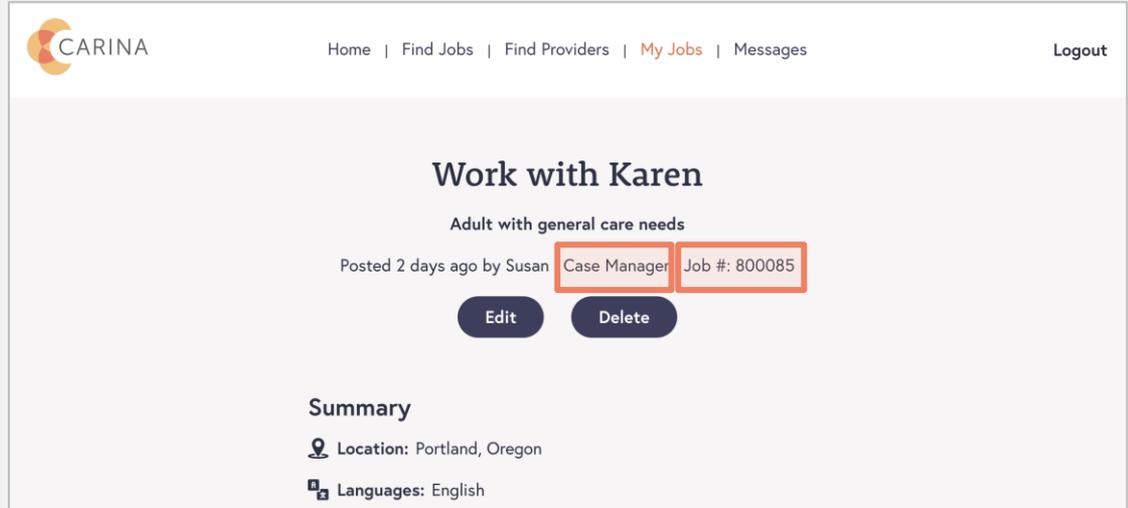
Address \*

Your street address is kept private and improves match results.

# View Job Post

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.



The screenshot shows the CARINA website interface. At the top left is the CARINA logo. To the right are navigation links: Home | Find Jobs | Find Providers | My Jobs | Messages. In the top right corner is a Logout link. The main content area features a job post titled "Work with Karen" with the subtitle "Adult with general care needs". Below the title, it says "Posted 2 days ago by Susan". The text "Case Manager" and "Job #: 800085" are highlighted with red boxes. Below this information are two dark blue buttons: "Edit" and "Delete". Underneath the buttons is a "Summary" section with two items: "Location: Portland, Oregon" and "Languages: English".

## 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"**.

Note: If the Level 2 Case Manager would like to save a provider profile for future reference, they can click **"Save"**. This will bookmark the profile and can be accessed again under "Saved Providers" on the account home page.

The screenshot displays a provider profile for Karen R. At the top, there is a circular profile picture placeholder with the initials "KR". Below the name, a yellow badge indicates "HCA Credentialed". A red box highlights two buttons: "Save" and "Message". Underneath, there are three icons representing different travel methods: a location pin, a car, and a bus. Below these icons, the text reads: "4 miles away by car", "3 minutes by car", and "No route available". A note states: "Travel time is calculated based on the current traffic conditions and time of day." The profile is divided into sections: "Summary" with details like "Location: Albany, OR (4 miles away)", "Languages: Chinese (Cantonese), English", "Provider's gender: Female", "Preferred consumer: No gender preference", "Monthly hours: 120 hours per month", and "Schedule: Sundays through Fridays, 8 a.m. to 4 p.m. (flexible)"; "Training Information" with a "Last updated: 11/29/2021" timestamp and a "HCA Credentialed" badge, followed by a note about training hours and a link to learn more; and "Caregiving preferences" with a "Care frequency" section where "Routine care" is selected.

# 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"**.

Home | Find Jobs | Find Providers | My Jobs | Messages

**Message Karen R.** ×

Start a conversation with Karen R.

Message

0 / 500

Select job post ▾

Cancel **Send**

Summary

The screenshot shows a web interface with a navigation bar at the top containing 'Home', 'Find Jobs', 'Find Providers', 'My Jobs', and 'Messages'. Below this is a white pop-up window titled 'Message Karen R.' with a close button (X) in the top right. The window contains the text 'Start a conversation with Karen R.' followed by a text input field labeled 'Message' with the placeholder 'Enter your message here\*'. Below the input field is a character count '0 / 500'. Underneath is a dropdown menu labeled 'Select job post' with a downward arrow. At the bottom of the window are two buttons: 'Cancel' and 'Send'. Red rectangular boxes highlight the message input field, the job post dropdown, and the 'Send' button. Below the pop-up, the word 'Summary' is visible.

# 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.

CARINA Home | Find Jobs | Find Providers | My Jobs Messages 1 Logout

Hi, Susan

**My Messages 1** [View >](#)

**KR Karen R.** 12/15/2021 10:34 p.m.  
Nice to meet you. My name is Karen. I'm interested in working with you and I would like to learn more about the job.

**Active Job Posts** [View >](#)

3 active job posts

**Saved Providers**

No saved providers.

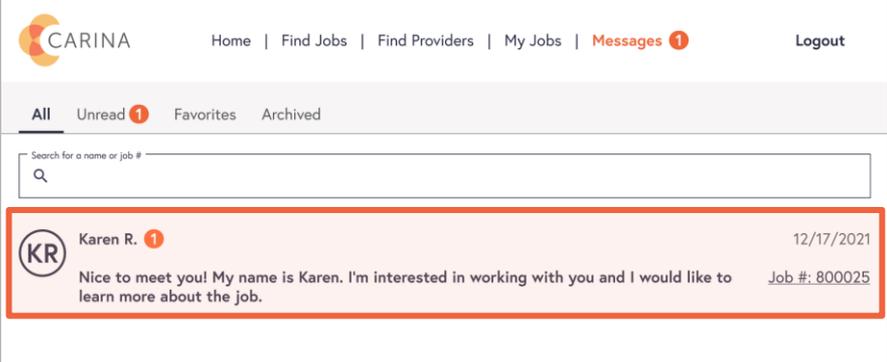
[Search for providers](#)

**Carina Tutorials** [View >](#)

# 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.



The screenshot shows the CARINA Messages interface. At the top, there is a navigation bar with the CARINA logo, links for Home, Find Jobs, Find Providers, My Jobs, Messages (with a red notification badge), and Logout. Below the navigation bar, there are tabs for All, Unread (with a red notification badge), Favorites, and Archived. A search bar is present with the placeholder text "Search for a name or job #" and a magnifying glass icon. The main content area displays a message from Karen R. (with a red notification badge) dated 12/17/2021. The message text is "Nice to meet you! My name is Karen. I'm interested in working with you and I would like to learn more about the job." To the right of the message, the job number "Job #: 800025" is displayed. A red rectangular box highlights the entire message entry.

# 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

## Note:

- These messages are organized by the specific job you posted on behalf of a consumer (indicated by the job #). All messages between you and the provider about this job post will appear here.
- Click **“+ More actions”** to favorite or archive a message.

The screenshot shows the CARINA messaging interface. At the top, there is a navigation bar with the CARINA logo, links for Home, Find Jobs, Find Providers, My Jobs, Messages, and Logout. Below the navigation bar, there is a 'Back to inbox' link. The main content area displays a message from Karen R., a provider. Her profile information includes a circular avatar with 'KR', her name 'Karen R.' with an 'Available Now' status, her gender 'Female', her role 'Provider', a 'Report User' link, her location 'Portland, Oregon (Less than a mile away)', and her availability '100 hrs/month'. There is also a 'View Profile' button and a 'Discussing Job #8000025' link. The message content shows a conversation where the user says 'Hi Karen,' and Karen R. responds 'Nice to meet you as well. My name is Karen. I'm interested in working with you and I would like to learn more about the job.' The 'Reply' button is highlighted with a red box. There is also a '+ More actions' button.

## 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.

CARINA

[Home](#) | [Find Jobs](#) | [Find Providers](#) | **My Jobs** | [Messages](#) **1** | [Logout](#)

Hi, Susan

**My Messages** **1** [View >](#)

**KR** Karen R. 12/15/2021 10:34 p.m.  
Nice to meet you. My name is Karen. I'm interested in working with you and I would like to learn more about the job.

**Active Job Posts** [View >](#)

3 active job posts

**Saved Providers**

No saved providers.

[Search for providers](#)

**Carina Tutorials** [View >](#)

# Select the job post that was filled

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

The screenshot shows the CARINA user interface for managing job posts. At the top, there is a navigation bar with the CARINA logo, links for Home, Find Jobs, Find Providers, My Jobs, and Messages, and a Logout button. The main heading is "My job posts", with a "View Deleted Jobs" link and a "Post a Job" button. Below this, there are two job listings. The first listing, "Work with Jason", is highlighted with a red box around its title. The second listing is "Work with Sally". Each listing includes details such as location, hours, schedule, language, and needs & environment. At the bottom of each listing are "Edit" and "Delete" buttons.

Notes: -

**Work with Jason**  
Adult with general care needs

Portland, Oregon (1 mile away)

100 hours per month (flexible)

Monday through Sunday at least 4 hours per day during day time or evening hours (flexible)

English, Spanish

**Needs & Environment:**  
Transport - using the provider's vehicle • Transport - using the consumer's vehicle • Housekeeping • Laundry • Mobility assistance (ambulation) • Pet(s)

Posted 2 days ago by Susan | Case Manager

Edit Delete

Notes: -

**Work with Sally**  
Older adult

Portland, Oregon (Less than a mile away)

200 hours per month (flexible)

Monday through Sunday any time (flexible)

English

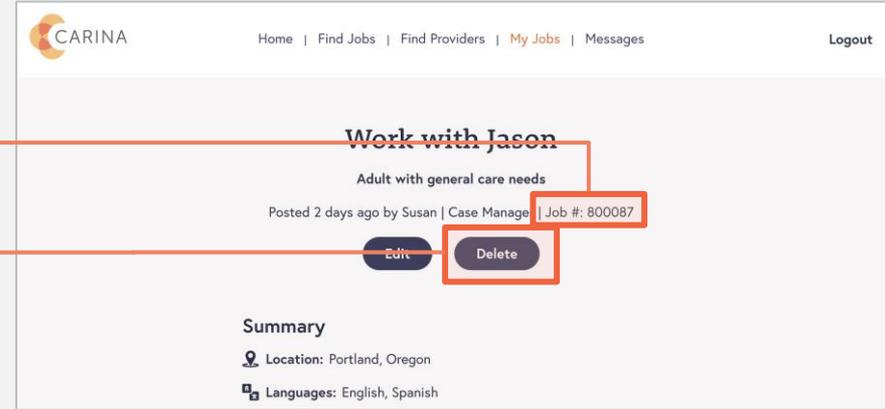
**Needs & Environment:**  
Mobility assistance (ambulation) • Transport - using the consumer's vehicle • Housekeeping • Pet(s)

Posted 3 days ago by Susan | Case Manager

Edit Delete

# 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”**.



The screenshot shows the CARINA website interface. At the top, there is a navigation bar with the CARINA logo on the left and links for Home, Find Jobs, Find Providers, My Jobs, and Messages on the right. A Logout link is also present in the top right corner. The main content area displays a job listing for 'Work with Jason', which is an 'Adult with general care needs'. The listing includes the text 'Posted 2 days ago by Susan | Case Manager | Job #: 800087'. Below this information are two buttons: 'Edit' and 'Delete'. The 'Delete' button is highlighted with a red rectangular box. Two red lines with circular endpoints point from the first and second steps of the list on the left to the 'Delete' button and the job number '800087' respectively.

# 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.

CARINA Home | Find Jobs | Find Providers | My Jobs | Messages Logout

## Delete job post #800087

Deleting your job post will remove it from Carina. Providers will no longer be able to see it.

Why are you deleting this job? \*

- The job was filled using Carina
- The job was filled through other means (not using Carina)
- The job was not filled

Please tell us more about what happened. \*

Comments

Cancel Delete

# **Section 4: Consumer Experience**



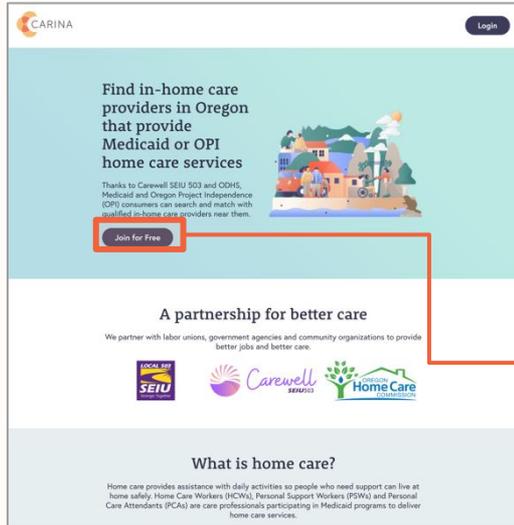
# Consumer Experience

**There are 7 primary steps for consumers on Carina:**

1. Receive an email from the case manager and click on the invite link (navigate to [Oregon consumer landing page](#))
2. Register for an account and complete the onboarding process
3. Create a job post
4. Search and message a provider
5. Learn more about a provider
6. Match!
7. Share experience

# Consumer Experience

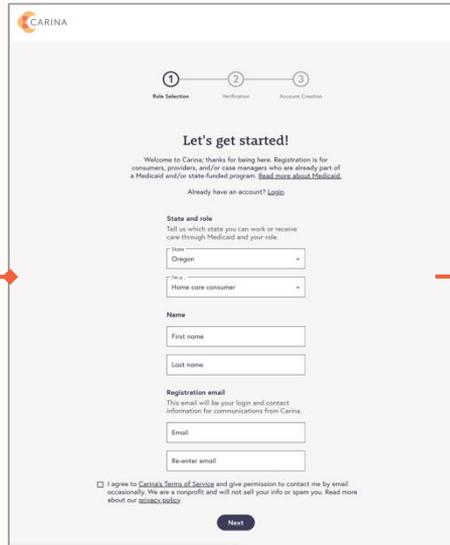
## 1. Receive and click invite link



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**

Let care providers know that you're hiring by posting a job. Jobs stay posted for up to 60 days and can easily be deleted, edited or reposted.

\* Indicates a required field.

**General Information**

Care category \* -

Consumer's gender \* -

Preferred provider gender \* -

Languages \* -

**Schedule**

Frequency of care \* -

Available monthly hours \*

This is the number of hours you need a care provider to fill.

These hours are flexible

Care schedule (days and times) \*

Example: Monday and Wednesday from 1 p.m. – 5 p.m.

100 characters maximum

These days and times are flexible

**Care needs**

What tasks would you like help with? (Check all that apply)

**General Care**

Housekeeping

Laundry

Meal preparation

Shopping

Hygiene & personal care

Medication management

Behavioral health

LGBTQ-friendly home care

Nurse delegated tasks

Post a job

# Consumer Experience

## 4. Search and message a provider

The screenshot shows the CARINA search interface. At the top, there's a navigation bar with 'Home | Find Jobs | Find Providers | My Jobs | Messages | Settings | Logout'. Below that, the address '215 Columbia Street, Seattle, WA 98104' and search criteria '60 minutes' and 'Distance' are visible. The main content area is titled '2 providers near you' and lists two providers: Karen S. and George M. Karen S. is highlighted with a red box around her 'View Profile' button. A red arrow points from this button to the provider profile page.

Search page

The screenshot shows the profile page for Karen R. It features a circular profile picture with the initials 'KR'. Below the name, it says 'Available Now' and 'Updated 1 day ago'. There are two buttons: 'Save' and 'Message', with the 'Message' button highlighted by a red box. Below this, there are icons for location, car, and bus, with text indicating '4 miles away by car', '3 minutes by car', and 'No route available'. The 'Summary' section includes location, language, gender, and schedule information. The 'Training Information' section states that the provider has completed at least 75 hours of state-approved training. The 'Caregiving preferences' section shows 'Routine care' is selected.

Provider profile page

The screenshot shows a 'Message Karen' modal form. It has a title bar with a close button. The main text says 'Start a conversation with Karen by introducing yourself and describing your job opportunity.' Below this is a reminder: 'Reminder: never share a consumer's protected health information (PHI) with others.' There is a text input field labeled 'Enter your message here\*'. Below the input field, there are two checkboxes: 'Send job post' and 'Send my phone number'. At the bottom right, there are 'Cancel' and 'Send' buttons.

Messaging form

# Consumer Experience

## 5. Learn more about a provider

The screenshot shows the CARINA user interface. At the top, there is a navigation bar with 'CARINA' logo and links for Home, Find Jobs, Find Providers, My Jobs, Messages, Settings, and Logout. Below the navigation bar is a 'Back to inbox' link. The main content area features a 'Working together?' button. The provider's profile for Karen S. is displayed, including her name, 'Available Now' status, gender (Female), location (Albany, Oregon), and availability (120 hours per month). There is a 'View Profile' button and a 'Report user' link. Below the profile is a message history section with three messages from Karen S. and John, dated 04/08/2022 and 04/18/2022. A note at the top of the messages states: 'Messages over one year old are deleted to protect personal information.'

### 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

The screenshot shows a form titled 'Delete job post #8125'. It includes a warning: 'Deleting your job post will remove it from Carina. Providers will no longer be able to see it.' Below this, there are three radio button options for 'Why are you deleting this job?': 'The job was filled using Carina', 'The job was filled through other means (not using Carina)', and 'The job was not filled'. A section titled 'Please tell us more about what happened.' contains a text input field for 'Comments' with a '500 characters maximum' limit. At the bottom, there are 'Cancel' and 'Delete' buttons.

### Share Your Experience / Delete Job 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.



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 your 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 your 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](mailto:info@carina.org)  
Carina.org, 215 Columbia St, Seattle, WA  
or update your [preferences](#)

Carina.org, 215 Columbia St, Seattle, WA 98104  
[Unsubscribe](#) [Manage preferences](#)

# Consumer Experience *In Detail*



# 1. Receive verification code and invite link

The first thing that must happen is for the case manager to *send an invite link and verification code to the consumer.*

This is the ONLY way consumers are able to register on Carina.

# Landing page

1. When the consumer clicks on the invite link that they received, they will see this page to learn more about this service and home care. [Consumer Landing Page Link](#)
2. To register, the consumer must click "Join for Free".

The screenshot shows the CARINA website landing page. At the top left is the CARINA logo, and at the top right is a 'Login' button. The main heading reads 'Find in-home care providers in Oregon that provide Medicaid or OPI home care services'. Below this is an illustration of a house with people and a car. A text block explains that thanks to Carewell SEIU 503 and ODHS, Medicaid and Oregon Project Independence (OPI) consumers can search and match with qualified in-home care providers. A 'Join for Free' button is highlighted with a red box. Below this, a section titled 'A partnership for better care' states that they partner with labor unions, government agencies, and community organizations. Logos for LOCAL 503 SEIU, Carewell SEIU503, and OREGON Home Care COMMISSION are displayed. The final section, 'What is home care?', defines home care as assistance with daily activities for people needing support, listing Home Care Workers (HCWs), Personal Support Workers (PSWs), and Personal Care Attendants (PCAs) as care professionals.

CARINA

Login

## Find in-home care providers in Oregon that provide Medicaid or OPI home care services

Thanks to Carewell SEIU 503 and ODHS, Medicaid and Oregon Project Independence (OPI) consumers can search and match with qualified in-home care providers near them.

Join for Free

### A partnership for better care

We partner with labor unions, government agencies and community organizations to provide better jobs and better care.

LOCAL 503 SEIU  
Carewell SEIU503  
OREGON Home Care COMMISSION

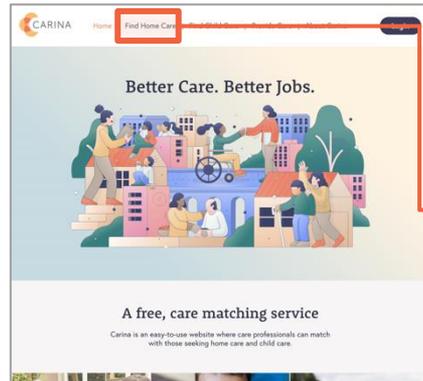
### What is home care?

Home care provides assistance with daily activities so people who need support can live at home safely. Home Care Workers (HCWs), Personal Support Workers (PSWs) and Personal Care Attendants (PCAs) are care professionals participating in Medicaid programs to deliver home care services.

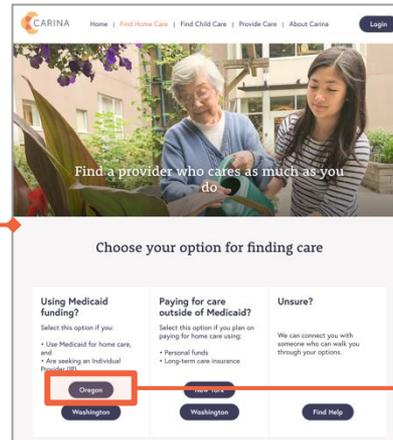
If the consumer happened to go directly to [www.carina.org](http://www.carina.org), they can get back to the landing page by following the sequence below:

1. Home -> Find Home care
2. Find Home Care -> Medicaid, Oregon
3. Oregon Landing page

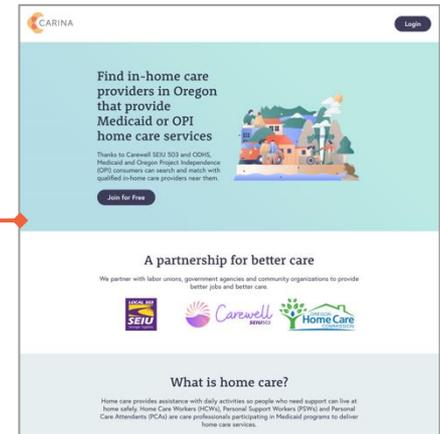
NOTE: If the consumer comes to the landing page through this route, the consumer MUST HAVE the verification code which they should have received from their case manager. Consumers in Oregon can only register on Carina through the invite link or by cutting and pasting the verification code during the registration/verification step.



Home



Find Home Care



Landing Page

## 2. Register and onboard

Once the consumer clicks on the invite link, then clicks the “Join for Free” button from the landing page, the consumer may 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

NOTE: The State and Role should be pre-populated in this page if the consumer came to this page from an invite link.

1. Afterwards, agree to ToS and click "Next".

The screenshot shows the CARINA registration interface. At the top left is the CARINA logo. A progress indicator at the top center shows three steps: 1. Role Selection (active), 2. Verification, and 3. Account Creation. Below the progress indicator is the heading "Let's get started!" followed by a welcome message: "Welcome to Carina; thanks for being here. Registration is for consumers, providers, and/or case managers who are already part of a Medicaid and/or state-funded program. [Read more about Medicaid.](#)" Below this is a link: "Already have an account? [Login](#)".

The main form section is titled "State and role" and includes the instruction: "Tell us which state you can work or receive care through Medicaid and your role." It contains two dropdown menus: "State" (pre-filled with "Oregon") and "My role" (pre-filled with "Home care consumer").

The "Name" section has two input fields: "First name" and "Last name".

The "Registration email" section includes the instruction: "This email will be your login and contact information for communications from Carina." It has two input fields: "Email" and "Re-enter email".

At the bottom, there is a checkbox with the text: "I agree to [Carina's Terms of Service](#) and give permission to contact me by email occasionally. We are a nonprofit and will not sell your info or spam you. Read more about our [privacy policy](#)." Below this is a dark blue "Next" button.

# Registration

## Verification

1. Double check that the name is inputted correctly.
2. Check that you see the verification code in this page.

Note: The verification code should be pre-populated in this page if the consumer came to this page from an invite link.

If the verification code is not pre-populated, the consumer should enter the verification code from the email.

1. Click “Verify”.

CARINA

✓ 2 3  
Role Selection Verification Account Creation

### Verification

To ensure all care recipients on Carina are Medicaid and Oregon Project Independence (OPI) consumers eligible for home care, we need to check the care recipient's Medicaid or OPI status.

Why do we need to verify information? ▾

**Name of care recipient**

First name  
John

Last name  
Consumer

**Input the care recipient's verification code**  
Find the verification code from email invitation.

Verification code  
TEST\_VERIFICATION\_1

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.

CARINA

Role Selection Verification Account Creation 3

### Password

Create a password for this Carina account.

Login email  
john.consumer@email.com

Password

Re-enter password

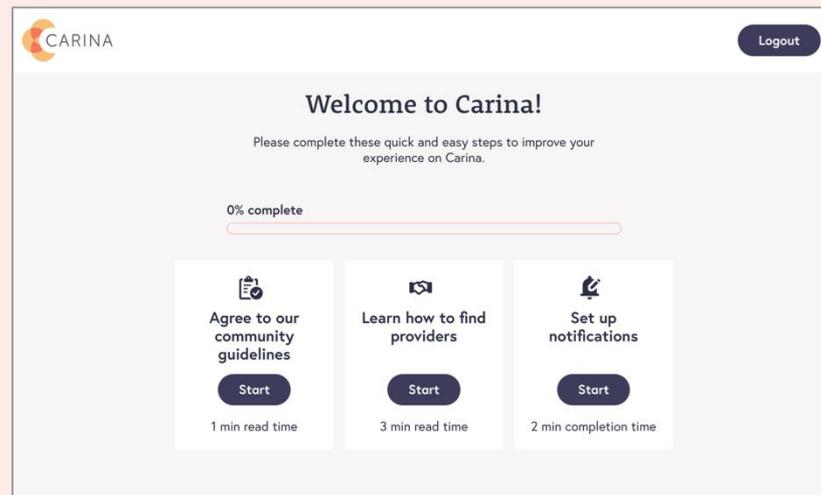
Create Account

# 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

Note: If the consumer’s session times out at this stage, the consumer just needs to log back in with the email and password that was set during registration.



# Onboarding

## Community Guidelines

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

Note: Part of the copy on this page will change in the future.

### Community guidelines

Welcome to our community! To ensure that everyone on Carina has a positive experience, we ask that you follow our community guidelines.



#### Be safe

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



#### Be responsive and professional

Please respond quickly to messages, and do not use unprofessional, discriminatory, inappropriate or abusive language.



#### Be approved

Remember to receive case manager authorization before you begin services with your new provider.



#### Be proactive

Once you have made a match, let us know so we can improve our services and measure our impact.



#### Be informed

Carina is a self-service tool to connect for care. It is not a guarantee of work or care.

We reserve the right to remove a user that violates the above guidelines.

I agree

# Onboarding

## “Learn how to find providers”

Consumers must read through the 5 steps in the tutorial. These 5 steps outline what consumers will need to do to find care.

The 5 steps in this tutorial are:

- Job Post
- Search
- Message
- Case Manager
- Delete Job Post

The screenshot displays a 5-step onboarding process at the top: 1. Job Post, 2. Search, 3. Message, 4. Case Manager, and 5. Delete Job Post. Below this is an illustration of two people at a laptop with a checklist icon. To the right, the section is titled "Create a Job Post" and includes the text: "If you are ready to have providers message you on Carina, **Post a job** to let providers know that you are searching for care."

**1. Go to "Post a Job"**

Once you complete the three steps to set up your account, you will be able to create a job post.

Click "My Jobs" at the top of the page, then click "Post a Job".

The screenshot also shows a navigation bar with the CARINA logo and links for Home, Find Jobs, Find Providers, My Jobs (highlighted with a red box), Messages, Settings, and Logout. Below the navigation bar, the user is greeted with "Hi, John" and a "My Messages" button with a "View" link.

# 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 (Optional):

- 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.

The screenshot shows the 'Account Settings' page on the Carina website. At the top left is the Carina logo, and at the top right is a 'Logout' button. Below the logo is a link to '< Back to previous page'. The main heading is 'Account Settings', followed by a disclaimer: 'Your email, phone number, and ZIP code will not be publicly displayed on Carina nor will it be shared with other users.' The page is divided into three sections: 'Email notifications', 'Phone number and text notifications', and 'Address'. Each section has a title, a sub-heading, and a list of notification options with checkboxes and dropdown menus for frequency. The 'Email notifications' section includes options for 'There are new providers near me', 'A provider matches my saved filters', 'My job posts expire', and 'Someone messages me on Carina'. The 'Phone number and text notifications' section includes a consent checkbox for receiving text messages, a phone number input field, and similar notification options as the email section. The 'Address' section includes a note about using address for nearby providers and a street address input field. A 'Save' button is located at the bottom right of the form.

**Account Settings**

Your email, phone number, and ZIP code will not be publicly displayed on Carina nor will it be shared with other users.

**Email notifications**

Log in and connect email  
johnc@john.com

Email me when:

- There are new providers near me  
Notify me: Daily
- A provider matches my saved filters  
Notify me: Daily
- My job posts expire  
(Job posts expire after 60 days)
- Someone messages me on Carina  
Notify me: Immediately  
Messaging notifications are required to be turned on during this initial set up in order to improve your experience on Carina. They may be turned off later.

**Phone number and text notifications**

Would you like to receive text messages from Carina?

- Yes, I consent to receive text messages from Carina to the phone number I provide.  
[Read more](#)

Enter your phone number

Text me when:

- There are new providers near me  
Notify me: Daily
- A provider matches my saved filters  
Notify me: Daily
- My job posts expire  
(Job posts expire after 60 days)
- Someone messages me on Carina  
Notify me: Immediately  
If you opt into receiving text messages, messaging notifications are required to be turned on during this initial set up in order to improve your experience on Carina. They may be turned off later.

**Address**

Enter your address so we can help you find providers near you.

Note: We use your address to show you providers that live near you. On each provider profile, you see the approximate travel distance between the provider's location and your address. We do not share or display this information to other users.

Street address

ex. 1234 Carina Ave NE

Save

# Onboarding Completed

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

**Hooray! You're now ready to start looking for home care!**

Now that you've set up your account, click the button below to access your account and start looking for home care.

[Start looking for home care](#)



### 3. Create a job post

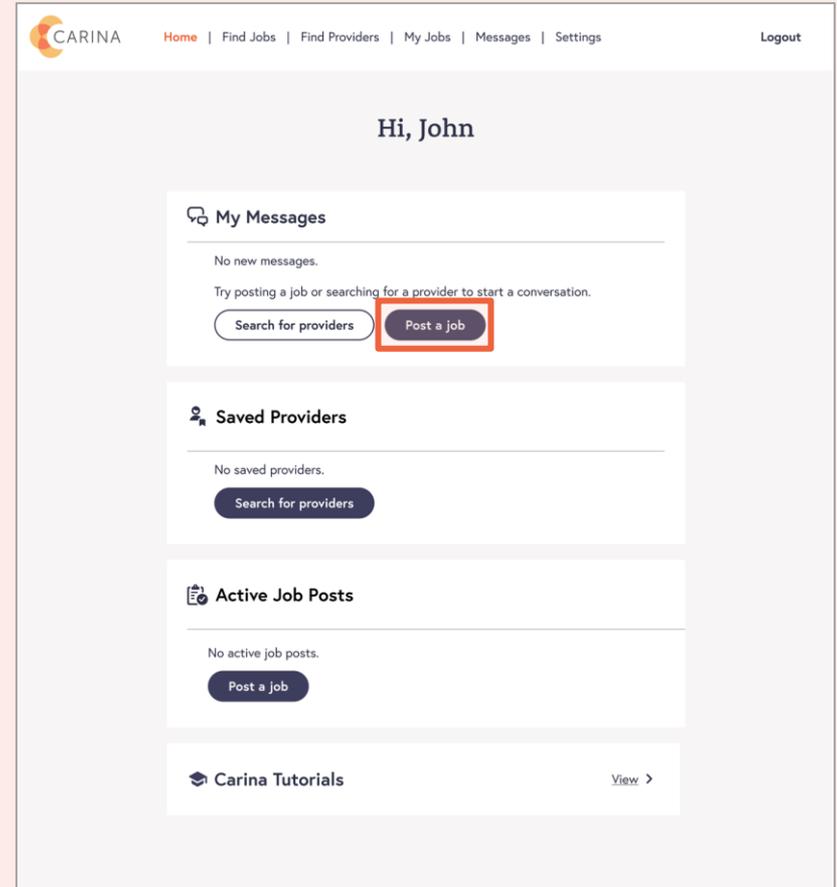
Now that the consumer has a Carina account after getting through registration and onboarding, we encourage the consumer to create a job post.

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

# Click “Post a job”

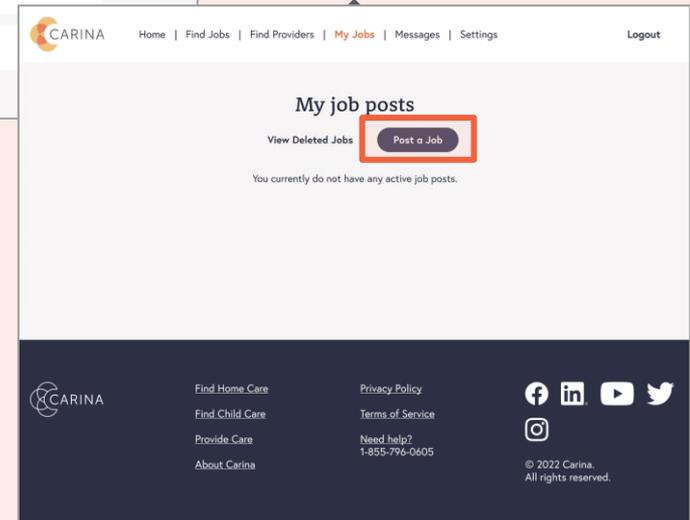
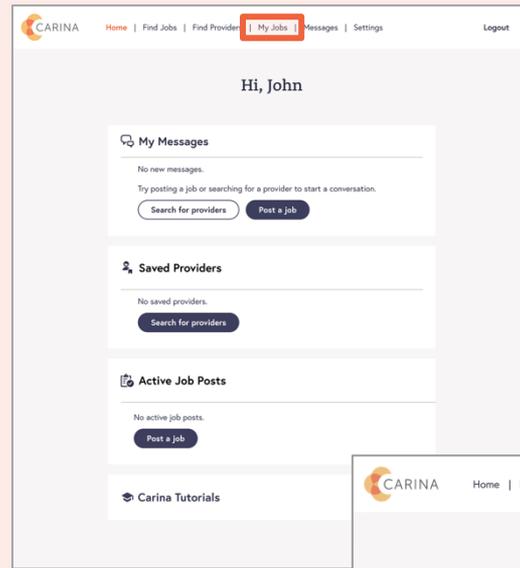
Once the user completes onboarding, they will land in their **account home page**. This page will show previews of new messages, saved providers, and the consumer’s job posts.

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



# Click “Post a Job”

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.

### Post a job

Let care providers know that you're hiring by posting a job. Jobs stay posted for up to 60 days and can easily be deleted, edited or reposted.

\* indicates a required field.

**General Information**

- Care category \*
- Consumer's gender \*
- Preferred provider gender \*
- Languages \*

**Schedule**

- Frequency of care \*
- Available monthly hours \*  
This is the number of hours you need a care provider to fill.
- These hours are flexible
- Care schedule (days and times) \*  
Example: Monday and Wednesday from 1 p.m. – 5 p.m.
- 100 characters maximum
- These days and times are flexible

**Care needs**

What tasks would you like help with? (Check all that apply.)

**General Care**

- Housekeeping
- Laundry
- Meal preparation
- Shopping
- Hygiene & personal care
- Medication management
- Behavioral health
- LGBTQ-friendly home care ?
- Nurse delegated tasks ?

**Movement**

- Mobility assistance (ambulation)
- Positioning
- Transfers
- Assisted transfers (using Hoyer Lyft, etc.)

**Transportation**

- Transport - using the consumer's vehicle
- Transport - using the provider's vehicle

**Home environment**

(Check all that apply.)

**Scents and smoking preferences**

- Fragrance-free home
- Non-smoking home
- Smoking home
- I prefer a non-smoking provider

**My pets**

- Dog(s)
- Cat(s)
- Bird(s)
- Other pet(s)

**Personality**

Hobbies, interests, vaccination status and other information  
Example: singing, watching movies, painting, etc.

200 characters maximum

**Location**

Address \*

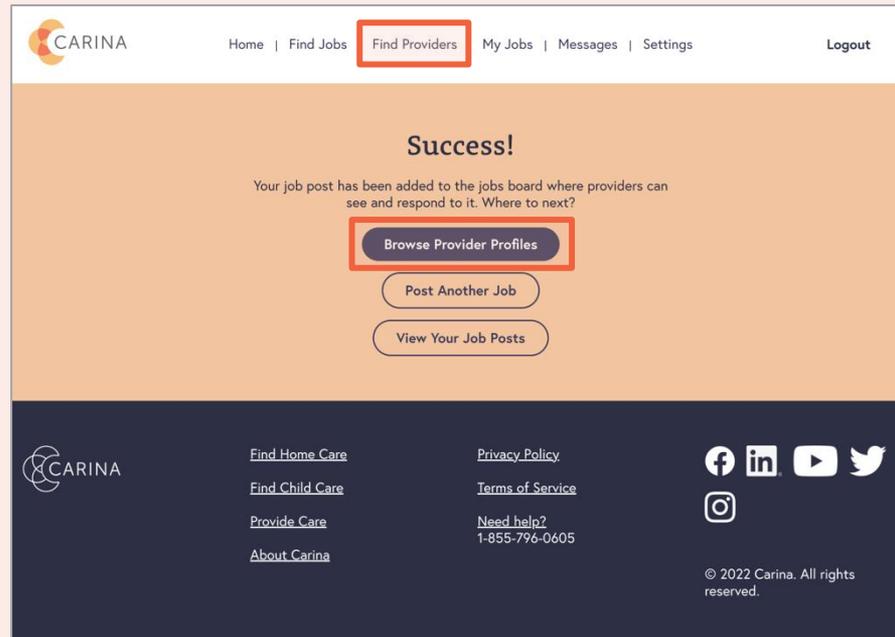
Your street address is kept private and improves match results.

## 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”**.

The screenshot displays the CARINA website interface. At the top, the navigation bar includes 'Home', 'Find Jobs', 'Find Providers', 'My Jobs', 'Messages', 'Settings', and 'Logout'. The main heading reads '2 providers near you'. Below this is an address field containing '215 Columbia Street, Seattle, WA 98104'. To the right of the address are two dropdown menus: 'Max travel time' set to '60 minutes' and 'Sort by' set to 'Distance'. On the left, a 'Refine your search' sidebar is visible, containing an 'Apply my job settings' button, a 'Clear filters' link, and several filter categories: 'Provider availability' (with 'Available now' selected), 'Monthly hours', 'Care category', 'Frequency', 'Consumer gender', 'Provider gender', 'Languages', and 'I need...'. At the bottom of the sidebar is a checkbox for 'Email me weekly when a provider matches these filters' and a link to 'View Settings to change notification preferences'. The main content area shows two provider profiles. The first profile is for 'Karen S.', a female provider available now, located in Seattle, Washington (1 mile away), with 20 hours per month and working Monday-Wednesday, 8am-12pm. Her skills include English. The second profile is for 'George M.', a male provider available now, located in Seattle, Washington (2 miles away), with 15 hours per month and working Monday through Friday, 1 p.m. to 7 p.m. (flexible). His skills include English and Russian. Both profiles have 'View Profile' and 'Message' buttons.

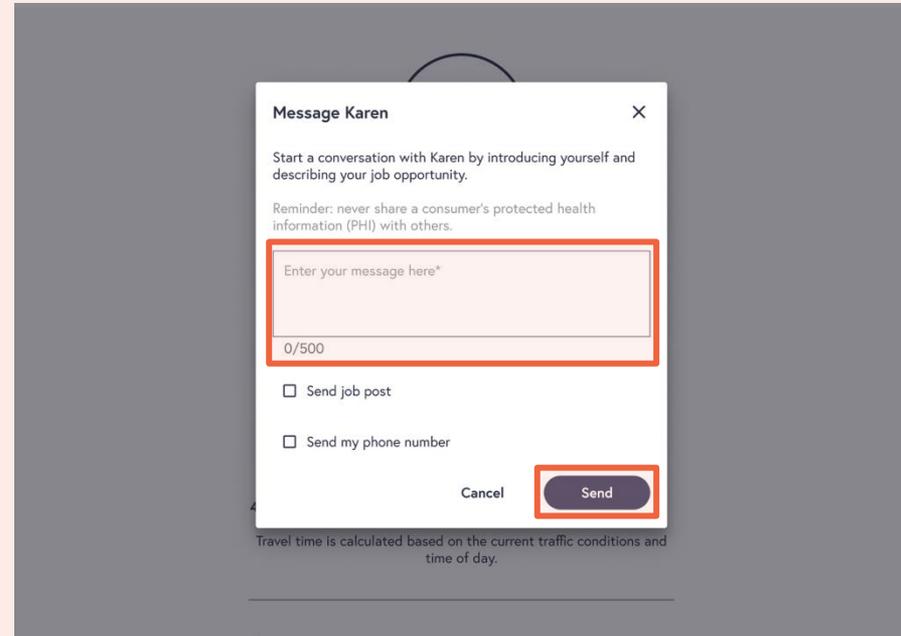
# View Provider Profiles

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.

The screenshot displays a provider profile for Karen R. At the top, there is a circular profile picture placeholder with the initials 'KR'. Below the name, a yellow badge indicates 'HCA Credentialed'. A red box highlights two buttons: 'Save' and 'Message'. Underneath, there are three icons representing travel options: a location pin icon with the text '4 miles away by car', a car icon with '3 minutes by car', and a bus icon with 'No route available'. A note states 'Travel time is calculated based on the current traffic conditions and time of day.' The 'Summary' section lists: Location: Albany, OR (4 miles away); Languages: Chinese (Cantonese), English; Provider's gender: Female; Preferred consumer: No gender preference; Monthly hours: 120 hours per month; Schedule: Sundays through Fridays, 8 a.m. to 4 p.m. (flexible). The 'Training Information' section shows 'HCA Credentialed' and notes that the provider has completed at least 75 hours of state-approved training and passed the Home Care Aide certification exam. The 'Caregiving preferences' section shows 'Care frequency' with 'Routine care' selected.

# Send a message

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.



The screenshot shows a mobile application interface for sending a message. The window is titled "Message Karen" and has a close button (X) in the top right corner. Below the title, there is a prompt: "Start a conversation with Karen by introducing yourself and describing your job opportunity." followed by a reminder: "Reminder: never share a consumer's protected health information (PHI) with others." A text input field is present with the placeholder text "Enter your message here" and a character count "0/500" below it. Below the input field, there are two checkboxes: "Send job post" and "Send my phone number". At the bottom of the form, there are two buttons: "Cancel" and "Send". The "Send" button is highlighted with a red border. At the very bottom of the screen, there is a small note: "Travel time is calculated based on the current traffic conditions and time of day."

# 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.

**Note:** If a consumer needs a refresher on how to use the Carina platform, they can click on the tutorial that is located near the bottom of their account page.

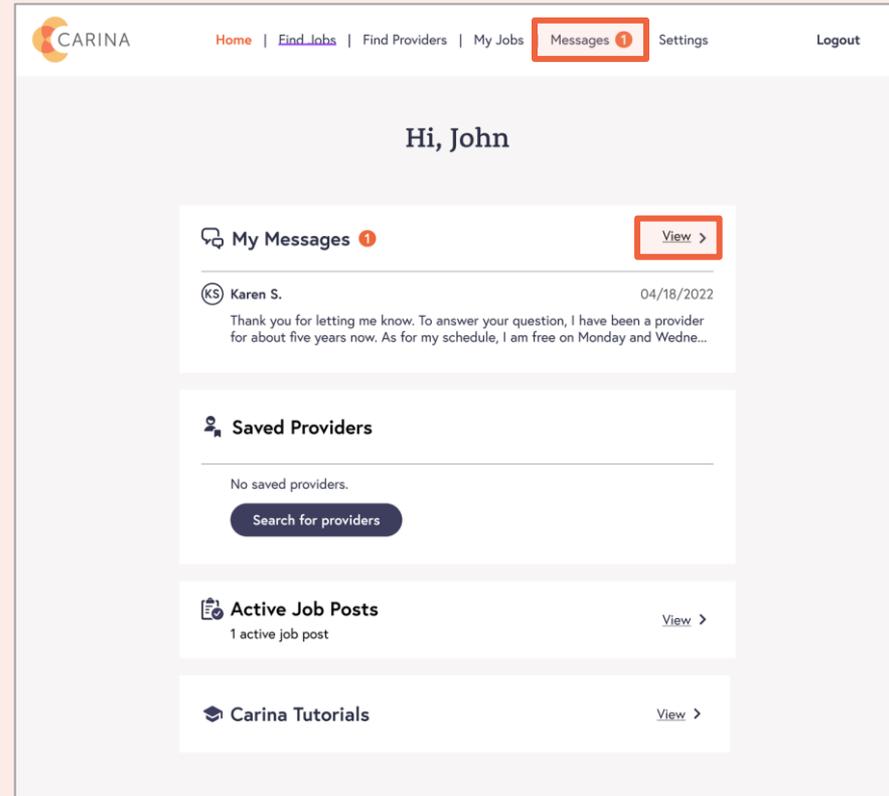
## 5. Learn more about a provider

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.

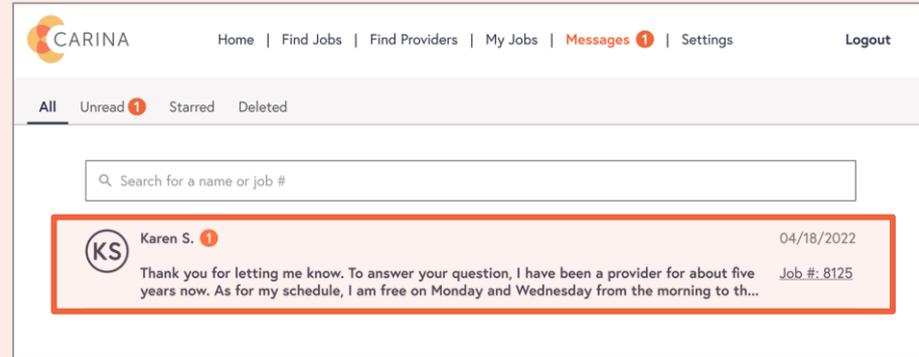
# Go to “Messages”

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.**



The screenshot shows the CARINA Messages interface. At the top, there is a navigation bar with the CARINA logo, links for Home, Find Jobs, Find Providers, My Jobs, Messages (with a red notification icon), and Settings, and a Logout button. Below the navigation bar, there are tabs for All, Unread (with a red notification icon), Starred, and Deleted. A search bar is present with the placeholder text "Search for a name or job #". The main content area displays a message from Karen S. (with a red notification icon) dated 04/18/2022. The message text is "Thank you for letting me know. To answer your question, I have been a provider for about five years now. As for my schedule, I am free on Monday and Wednesday from the morning to th..." and includes a link for "Job #: 8125". The entire message card is highlighted with a red border.

CARINA Home | Find Jobs | Find Providers | My Jobs | Messages **1** | Settings Logout

All Unread **1** Starred Deleted

Search for a name or job #

**KS** Karen S. **1** 04/18/2022

Thank you for letting me know. To answer your question, I have been a provider for about five years now. As for my schedule, I am free on Monday and Wednesday from the morning to th... [Job #: 8125](#)

# Read and respond

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.

The screenshot displays the CARINA messaging interface. At the top, the navigation bar includes the CARINA logo, a home icon, and links for Home, Find Jobs, Find Providers, My Jobs, Messages, Settings, and Logout. Below the navigation bar is a breadcrumb link for Back to inbox. The main content area features a header for the provider, Karen S., with a status of Available Now, location of Albany, Oregon, and 120 hours per month. A View Profile button and a Report user link are also visible. A message from Karen S. dated 04/08/2022 is shown, followed by a response from John dated 04/18/2022. A third message from Karen S. dated 04/18/2022 is highlighted with a red border. At the bottom, there is a + More actions button and a Reply button.

CARINA Home | Find Jobs | Find Providers | My Jobs | Messages | Settings Logout

< Back to inbox

Working together? >

**KS** Karen S. Available Now Female • Provider Albany, Oregon 120 hours per month View Profile Report user Discussing Job #: 8125

Messages over one year old are deleted to protect personal information.

**KS** Karen S. 04/08/2022  
Hi John. My name is Karen. Nice to meet you! I'm interested in working with you and I just have a couple of questions about the job you posted.

**J** John 04/18/2022  
Hi Karen, nice to meet you! I would like to hear more about your background in home care. My hours on Monday and Wednesday are generally pretty flexible and I can work around your availability and schedule.

**KS** Karen S. 04/18/2022  
Thank you for letting me know. To answer your question, I have been a provider for about five years now. As for my schedule, I am free on Monday and Wednesday from the morning to the afternoon. I am also generally flexible so please let me know what works for you.

+ More actions Reply

## 6. Match!

Hooray!

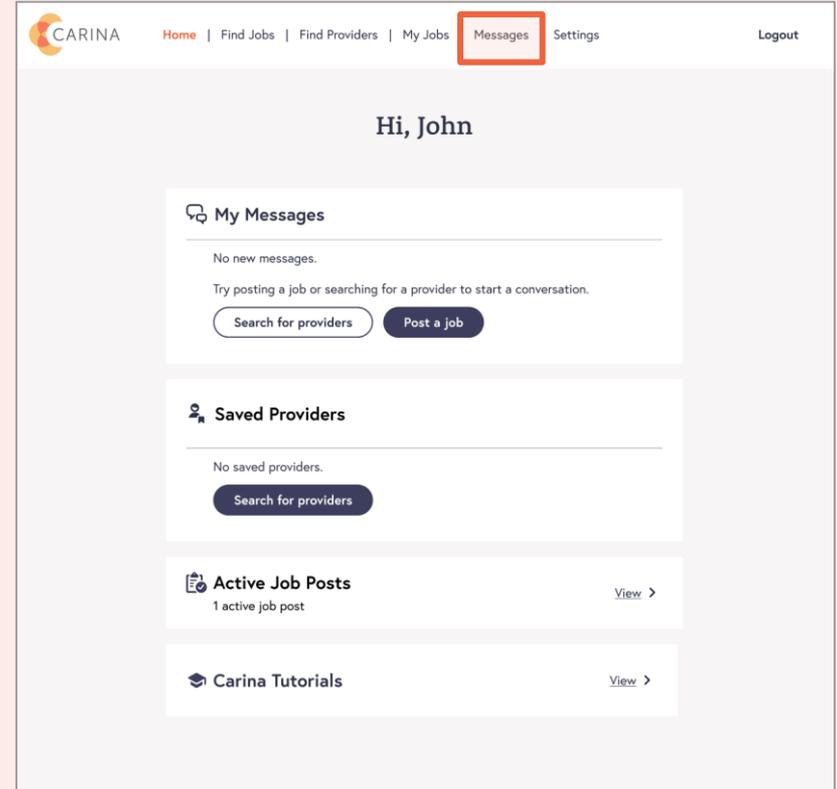
After the consumer speaks with the provider and decides to work together, the consumer must let the case manager know about the news.

## 7. Share experience

Then once everything gets approved for work, 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”

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



# Select the job post that was filled

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

CARINA Home | Find Jobs | Find Providers | My Jobs | Messages | Settings Logout

## My job posts

View Deleted Jobs Post a Job

**Work with John**  
Male adult with general care needs

📍 Seattle, Washington (Less than a mile away)

🕒 80 hours per month

📅 Monday - Friday, 8am to 12pm.

🗣️ English

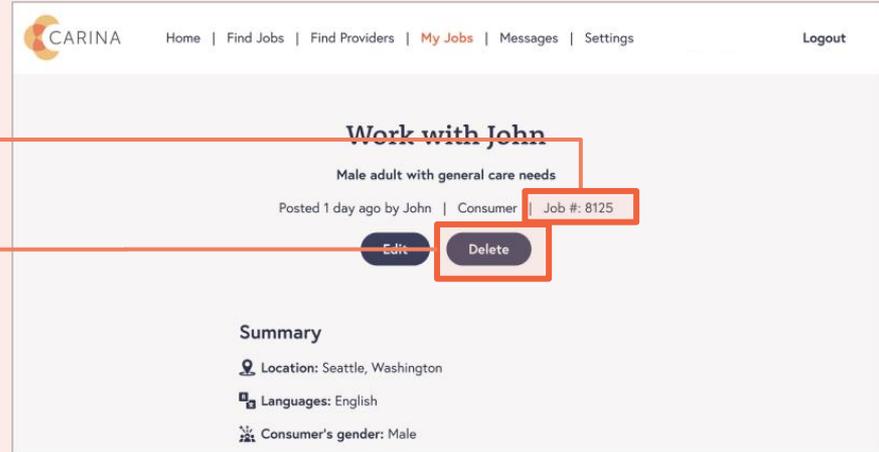
**Needs & Environment:**  
Shopping • Laundry • Transport - using the provider's vehicle • Housekeeping

Posted 1 day ago by John | Consumer

Edit Delete

# Click on “Delete”

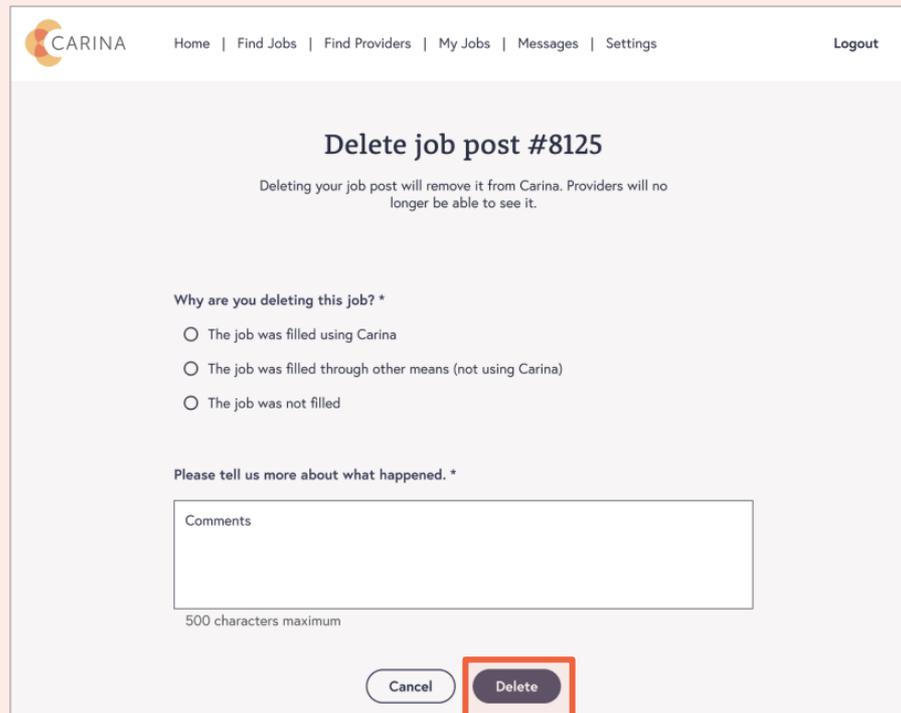
1. Check that you are deleting the correct job by double checking the job number.
2. Once you’ve checked, click “Delete”.



# 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”.

Note: The copy on this page may change in the future.



The screenshot shows a web interface for deleting a job post. At the top left is the Carina logo, and to its right are navigation links: Home, Find Jobs, Find Providers, My Jobs, Messages, and Settings. At the top right is a Logout link. The main heading is "Delete job post #8125". Below this is a warning: "Deleting your job post will remove it from Carina. Providers will no longer be able to see it." The form asks "Why are you deleting this job?\*" with three radio button options: "The job was filled using Carina", "The job was filled through other means (not using Carina)", and "The job was not filled". Below this is a section "Please tell us more about what happened.\*" with a text input field labeled "Comments" and a note "500 characters maximum". At the bottom are two buttons: "Cancel" and "Delete", with the "Delete" button highlighted by a red square.

# 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.

**CARINA** Home | Find Jobs | Find Providers | My Jobs | Messages | Settings Logout

## Settings

Your email, phone number, and ZIP code will not be publicly displayed on Carina nor will it be shared with other users.

**Password** Click here to receive a link to reset your password.  
[Send Link to Email](#)

**Email** If you need to change your email address, please send a message to [contactus@carina.org](mailto:contactus@carina.org).

**Email notifications** Login and contact email: john@john.com  
Email me when:  
 There are new providers near me  
Notify me: Daily  
 A provider matches my saved filters  
Notify me: Daily  
 My job posts expire (Job posts expire after 60 days)  
 Someone messages me on Carina  
Notify me: Immediately

**Phone number and text notifications** Would you like to receive text messages from Carina?  
 Yes, I consent to receive text messages from Carina to the phone number I provide.  
[Read more](#)  
Enter your phone number  
Text me when:  
 There are new providers near me  
Notify me: Daily  
 A provider matches my saved filters  
Notify me: Daily  
 My job posts expire (Job posts expire after 60 days)  
 Someone messages me on Carina  
Notify me: Immediately

**Address** Enter your address so we can help you find providers near you.  
Note: We use your address to show you providers that live near you. On each provider profile, you see the approximate travel distance between the provider's location and your address. We do not share or display this information to other users.  
Street address:  
216 Columbia Street, Seattle, Washington 98104, United ...  
ex. 1234 Carina Ave NE  
[Save](#)

# **Section 5: Provider Experience**



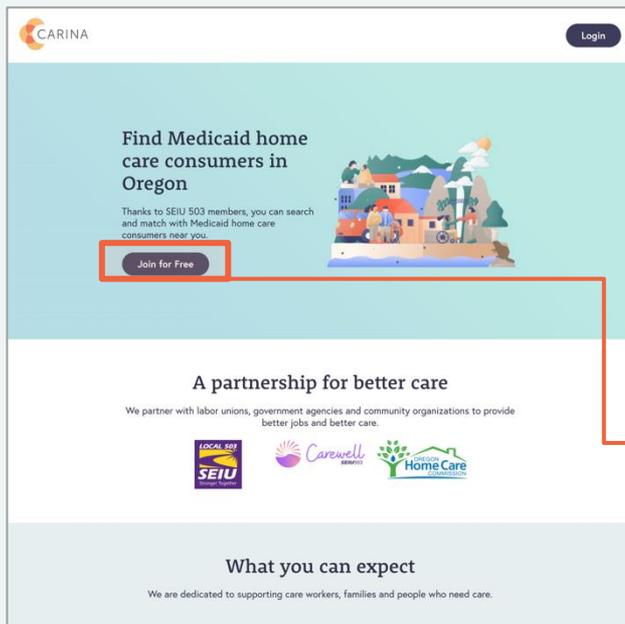
# Provider Experience

There are 7 primary steps for providers on Carina:

1. Navigate to the registration page ([from the Oregon landing page](#))
2. Register for an account, complete the onboarding process, 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

# Provider Experience

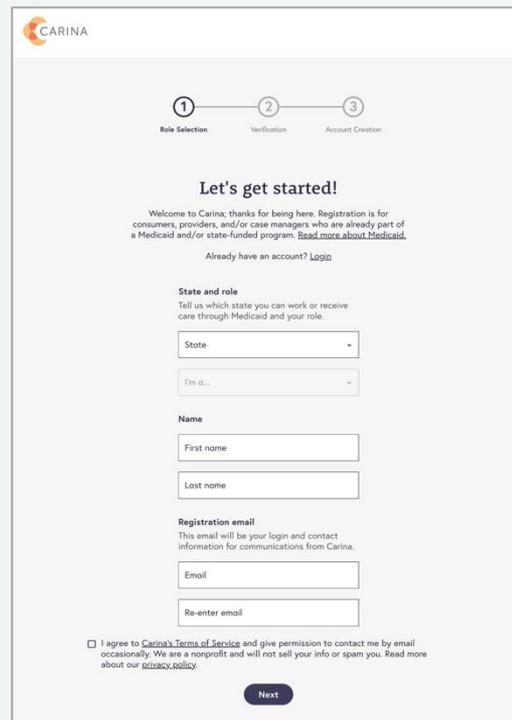
## 1. Navigate to the registration page



Oregon landing page

## 2. Register and Onboard

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



Registration page

# Provider Experience

## 3. Search and message a consumer

The screenshot shows the CARINA search page. At the top, there are navigation links: Home, Find Jobs, Find Providers, My Profile, Messages, Settings, and Logout. The main heading is "2 jobs near you". Below this is a search bar with the address "215 Columbia Street, Seattle, WA 98104" and filters for "Max travel time" (60 minutes) and "Distance". A "Refine your search" section on the left includes filters for "Apply my profile preferences", "Clear filters", "Monthly hours" (Less than 40, 40-79, 80-119, More than 120), "Care category", "Frequency", "Consumer gender", "Provider gender", "Work environment", "Languages", and "Exclude consumers who need...". Two job listings are shown: "Work with John" (Male adult with general care needs, Seattle, Washington, 1 mile away, 80 hours per month, Monday-Friday, 8am to 12pm, English, Needs & Environment: Shopping, Laundry, Transport) and "Work with Sam" (Male adult with developmental disabilities, Seattle, Washington, 2 miles away, 90 hours per month, Weekends only, any time between 8 a.m. to 6 p.m., English, Needs & Environment: Behavioral health, Transport). The "Message" button on the "Work with John" listing is highlighted with a red box.

Search page

The screenshot shows the "Work with John" job post page. The title is "Work with John" and the subtitle is "Male adult with general care needs". It was posted 1 day ago by John, a consumer, for job # 8125. There are "Save" and "Message" buttons. Below the buttons are icons for location, car, and bus, with travel times: "4 miles away by car", "2 minutes away by car", and "5 minutes away by bus". A note states: "Travel time is calculated based on the current traffic conditions and time of day." The "Summary" section includes: Location: Albany, OR; Languages: English, Russian; Consumer's gender: Male; Preferred provider: No gender preference; Frequency: Respite or relief care; Monthly hours: 120 hours per month; Schedule: Sundays through Fridays, 6 a.m. to 4 p.m. (flexible). The "Care needs" section lists: General care, Housekeeping, Laundry, Meal preparation, Shopping, Hygiene and personal care, Medication management, and Behavioral health.

Job post page

The screenshot shows the "Work with John" messaging form. The title is "Work with John" and the subtitle is "Message John". It includes a close button (X). The text says: "Start a conversation with John by introducing yourself and describing your qualifications." Below this is a reminder: "Reminder: never share a consumer's protected health information (PHI) with others." There is a text input field labeled "Enter your message here\*" with a character count of "0/500". Below the input field are two checkboxes: "Send my phone number" and "I understand that, should I be hired, case manager approval is required to begin work and receive payment.\*". At the bottom are "Cancel" and "Send" buttons.

Messaging form

# Provider Experience

## 4. Learn more about a consumer

## Messages

## 5. Match!

After the consumer speaks with the provider and decides to work together, the consumer must let the case manager know so they can authorize the service provider.

This step happens offline.

## 6. Share your experience

## Match Survey

# Provider Experience

## 7. Update availability

\* indicates a required field.

Karen S.



Upload Profile Picture

**Status**

Are you available to care for a new consumer? \*

- Yes, I am currently available
- No, but I will be soon
- No, I am not available

### Edit Profile page

# Ongoing Encouragement

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.



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 one 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.



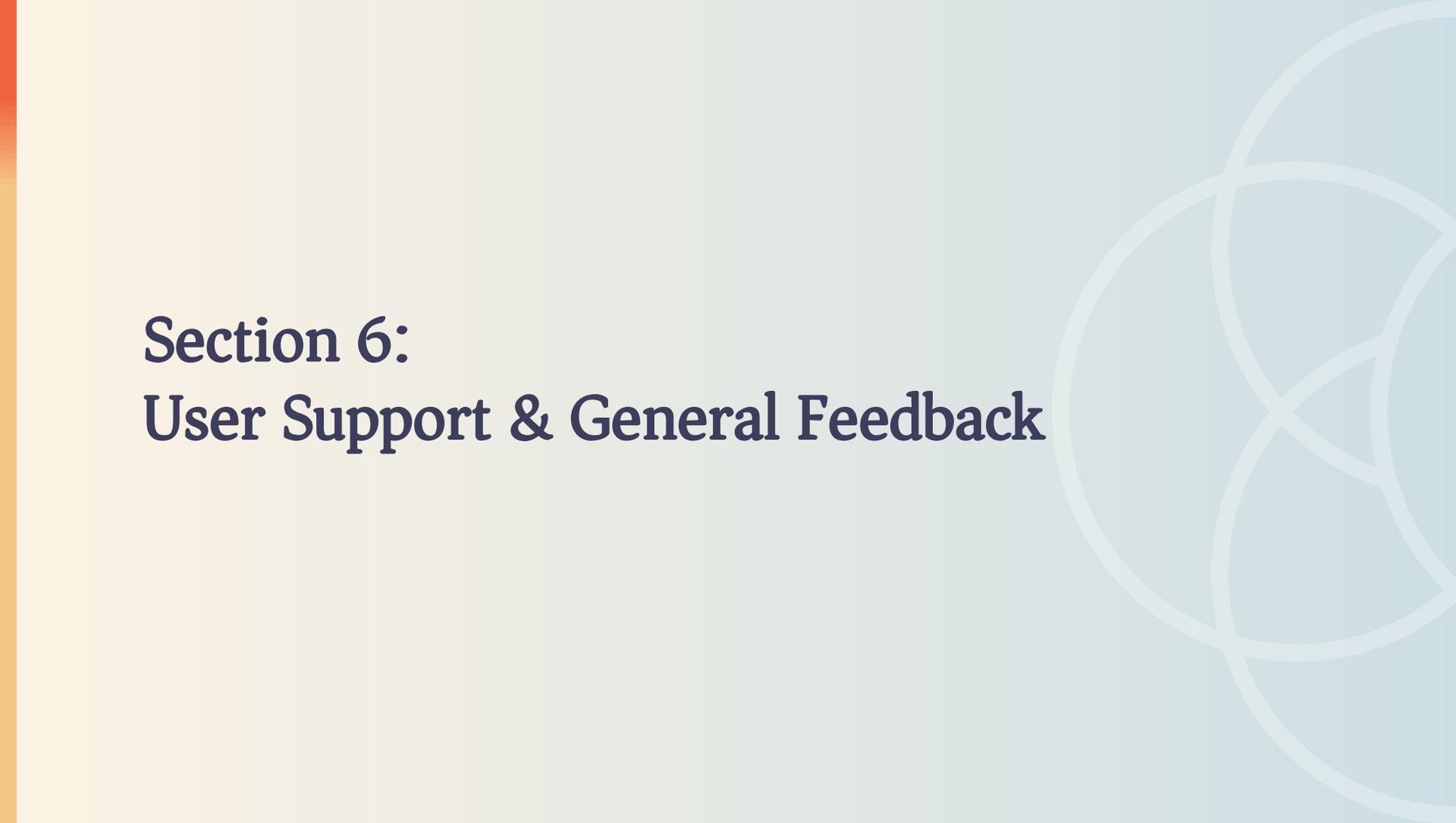
- 1. Start Your Search:** You can start your search for a home care provider at any time. While you have already reached out to a home care agency, we encourage you to start a new search if:
  - You want to view the most up-to-date availability in your area
  - Your desired location has changed
  - Your care needs or preferences have changed
  - You need another home care provider
- 2. Filter Based on Your Needs:** After submitting your 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 your 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](mailto:info@carina.org)  
Carina.org, 215 Columbia St, Seattle, WA,  
or update your [preferences](#)

Carina.org, 215 Columbia St, Seattle, WA 98104  
[Unsubscribe](#) [Manage preferences](#)



# **Section 6:** **User Support & General Feedback**

# Need Additional Help Using Carina?

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
- The consumer verification code is not working
- Carina's website is unexpectedly down

# We Love Feedback!

For **sharing general feedback** or your experience on the Carina platform:  
Please reach out to our project team at RISE Partnership/Carewell SEIU 503  
at [carina@risepartnership.com](mailto:carina@risepartnership.com)

Examples:

- Suggestions for improvements/adjustments
- Requests for additional supports

# **Section 7: Security on Carina**



# How we keep you and our website secure



## We keep your information private

- Only verified Medicaid participants can use the service.
- We never display your last name, email, phone number or address to other Carina users.
- We only show travel time between providers and consumers and do not display any addresses.

# How we keep you and our website secure



## You control the information you share

- We developed a private messaging system to communicate between consumers and providers so that data is not shared elsewhere.
- You can choose to share your information and other details when you are ready by using Carina's private messaging system or by setting up a time to talk and meet offline.
- We only show only minimally necessary information on job posts and provider profiles and encourage sharing details by using private messaging.

# How we keep you and our website secure



## You can report negative behavior

- We have a reporting system so users can immediately report inappropriate user behavior.
- The reporting system provides an automated instant responses with directions on if immediate help is needed.
- All reports are reviewed by Carina user support.

# How we keep you and our website secure



## We have added automated safeguards

- Our private messaging system removes messages beyond one year.
- We have in-app reminders to limit information sharing - especially regarding protected health information.
- We scan content to check for inappropriate language.
- We automatically log you out after a certain time of inactivity so someone else cannot access your account.
- Passwords expire after a certain period of time.

# 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

# Reporting Users Process



# Expectations for Carina Users

Carina is an inclusive and respectful community and a safe space for consumers and providers to connect. 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** which can be found on our website and when registering your account.

# How to Report Inappropriate Behavior

If you believe someone using the Carina site has violated our Terms of Service and behaving inappropriately, 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: Reporting Users 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.

# Contact Information

**JaNae Hagel**

(she/they)

Stakeholder Engagement Liaison

RISE Partnership/Carewell SEIU 503

Email: [carina@risepartnership.com](mailto:carina@risepartnership.com)