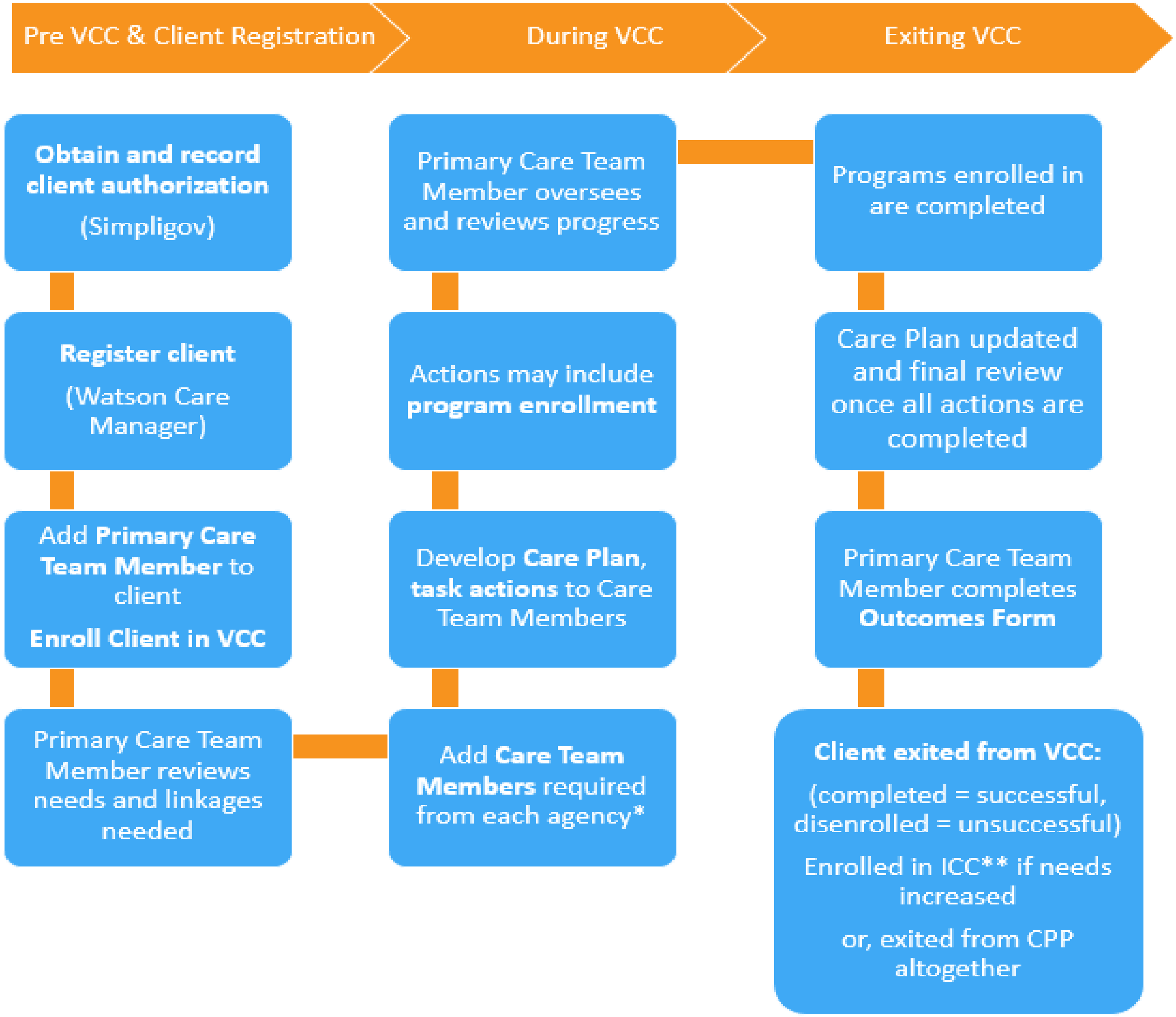
Watson Care Manager
Training Session 1

How to Search, Add and View a Client in WCM

CarePlus
PROGRAM

Virtual Care Coordination (VCC) Workflow

A Care Plus Program client will normally be enrolled in VCC initially. If ICC criteria is met, refer to ICC workflow. A client may also return to VCC following a decrease in need after a period receiving ICC.



Pre VCC & Client Registration

Obtain and record client authorization (Simpligov)

Register client (Watson Care Manager)

Add **Primary Care Team Member** to client

Enroll Client in VCC

Primary Care Team Member reviews needs and linkages needed

During VCC

Add Care Team Members required from each agency*

Develop **Care Plan, task actions** to Care Team Members

Actions may include **program enrollment**

Primary Care Team Member oversees and reviews progress

Exiting VCC

Programs enrolled in are completed

Care Plan updated and final review once all actions are completed

Primary Care Team Member completes **Outcomes Form**

Client exited from VCC:

(completed = successful, disenrolled = unsuccessful)

Enrolled in ICC** if needs increased

or, exited from CPP altogether

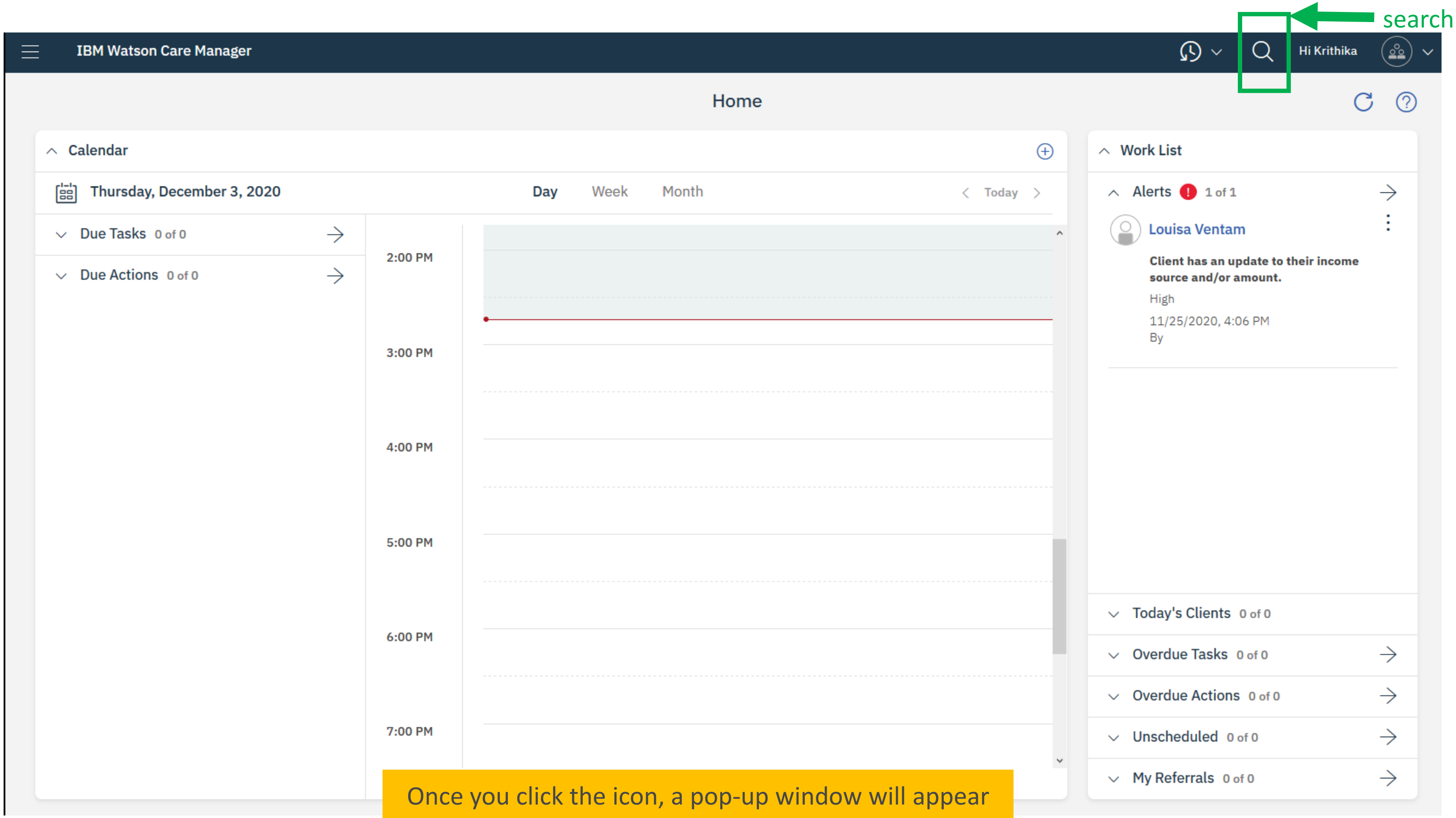
Each agency to identify a Primary Lead. The Primary Lead member role is to oversee the care coordination for that client on behalf of their agency. The Primary Lead may play a role in completing Care Plan actions and Care Team tasks or they may delegate to a Care Team Member in their agency as a Core Team member in WCM. The Primary Lead should also include themselves as a Core Team member in WCM.

For example, if the client would benefit from mental health screening and assessment, add BHS Care Team Member. If the client needs benefits eligibility check, add SSA Care Team Member.

**Refer to Intense Care Coordination (ICC) workflow.

Step 1: Logging In | Step 2: Search for Client | Step 3: View Client VCR | Step 4: Register Client | Step 5: View Care-team Page | Step 6: Add Client to Care Team

1. Click icon to expand search window


IBM Watson Care Manager
Hi Krithika
Home
Calendar
Day
Week
Month
Today
Due Tasks 0 of 0
Due Actions 0 of 0
2:00 PM
3:00 PM
4:00 PM
5:00 PM
6:00 PM
7:00 PM
Work List
Alerts 1 of 1
Today's Clients 0 of 0
Overdue Tasks 0 of 0
Overdue Actions 0 of 0
Unscheduled 0 of 0
My Referrals 0 of 0

Thursday, December 3, 2020

Louisa Ventam

Client has an update to their income source and/or amount.

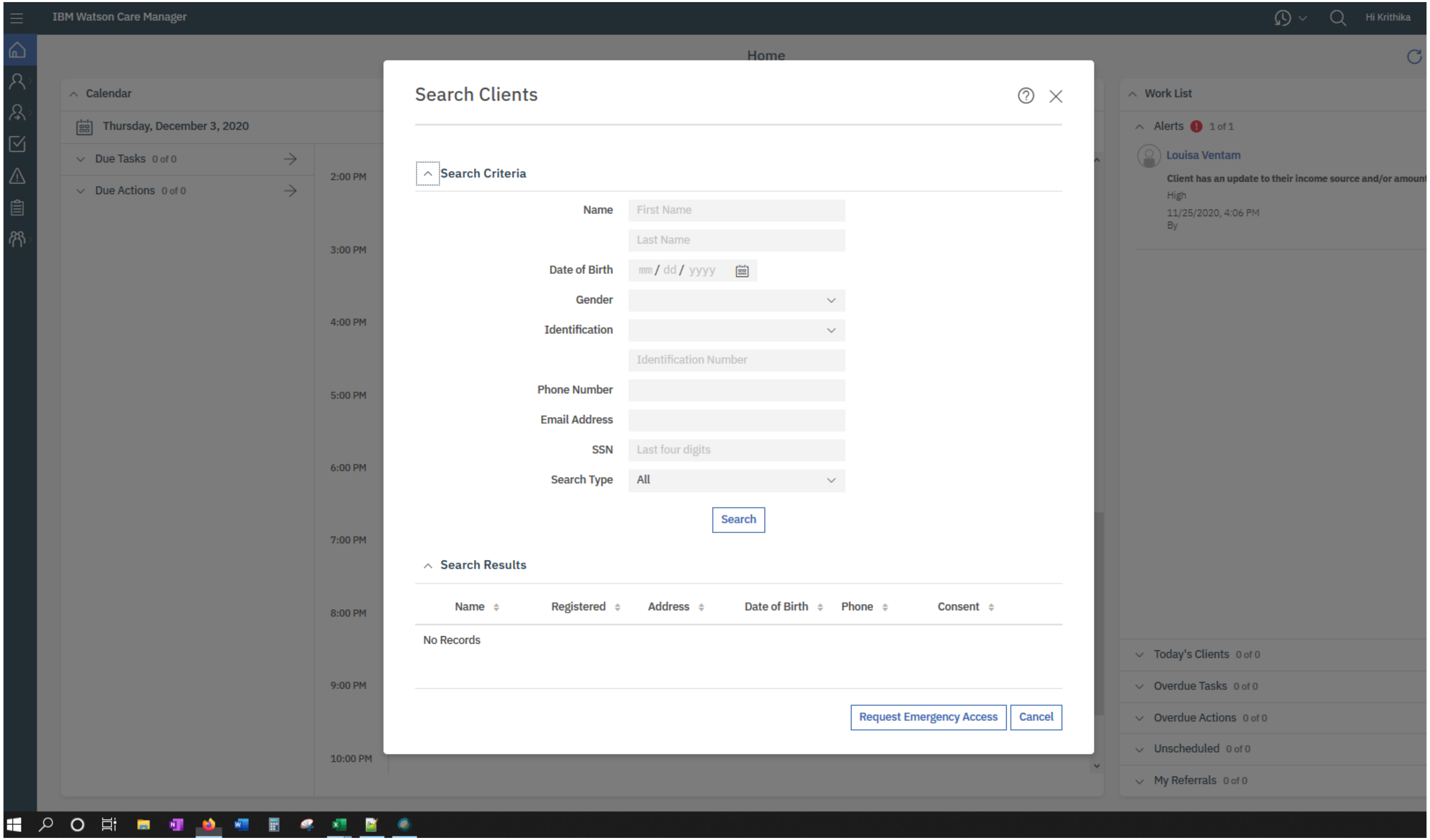
High

11/25/2020, 4:06 PM

By

Once you click the icon, a pop-up window will appear which is shown on the following slide.

Step 1: Logging In
Step 2: Search for Client
Step 3: View Client VCR
Step 4: Register Client
Step 5: View Care-team Page
Step 6: Add Client to Care Team


IBM Watson Care Manager
Hi Krithika
Home
Calendar
Thursday, December 3, 2020
Due Tasks 0 of 0
Due Actions 0 of 0
2:00 PM
3:00 PM
4:00 PM
5:00 PM
6:00 PM
7:00 PM
8:00 PM
9:00 PM
10:00 PM
Work List
Alerts 1 of 1
Louisa Ventam
Client has an update to their income source and/or amount
High
11/25/2020, 4:06 PM
By
Today's Clients 0 of 0
Overdue Tasks 0 of 0
Overdue Actions 0 of 0
Unscheduled 0 of 0
My Referrals 0 of 0

Search Clients

Search Criteria

Name	First Name Last Name
Date of Birth	mm / dd / yyyy
Gender	
Identification	
	Identification Number
Phone Number	
Email Address	
SSN	Last four digits
Search Type	All

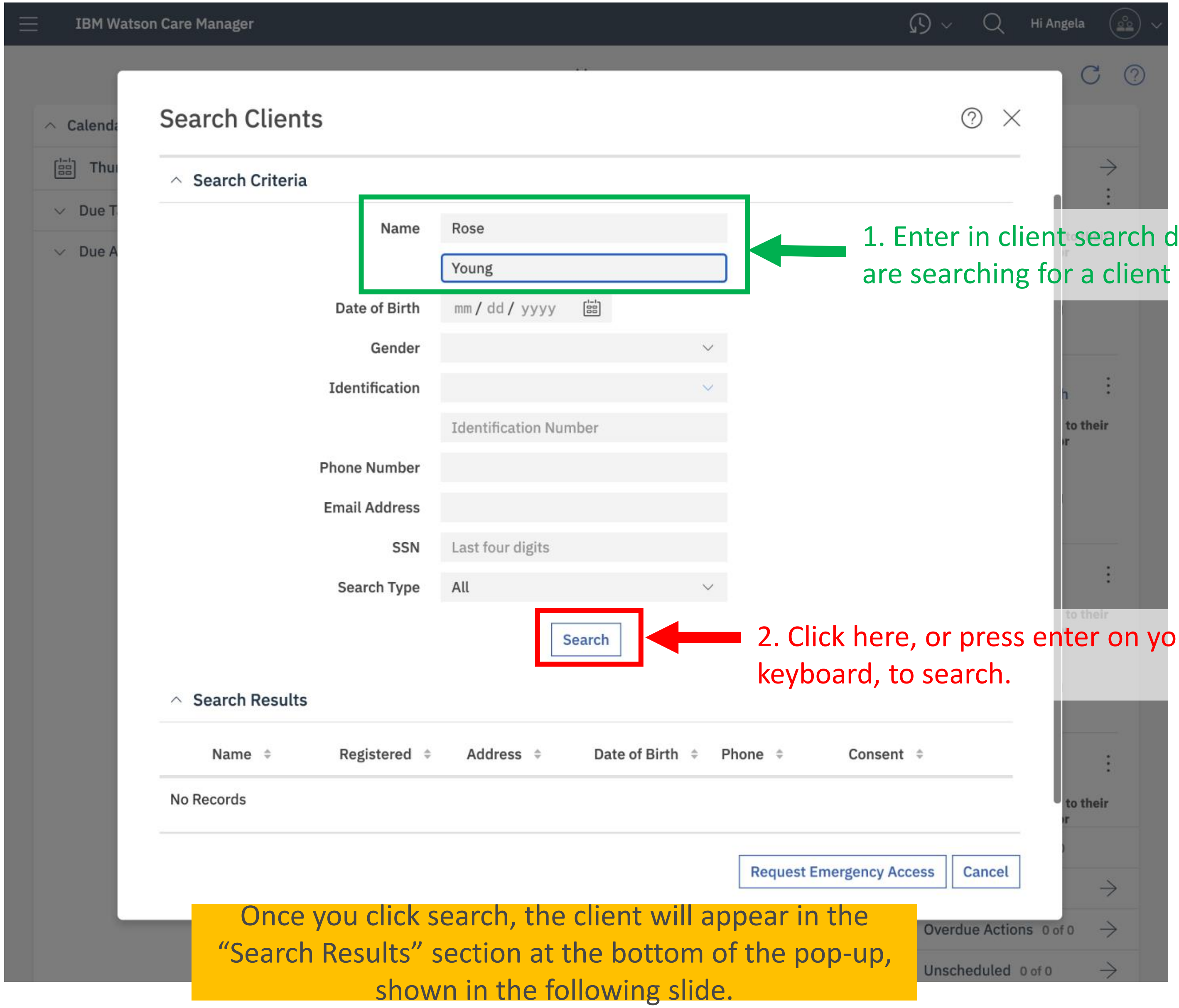
Search

Search Results

Name	Registered	Address	Date of Birth	Phone	Consent
No Records					

Request Emergency Access
Cancel

Step 1: Logging In | Step 2: Search for Client | Step 3: View Client VCR | Step 4: Register Client | Step 5: View Care-team Page | Step 6: Add Client to Care Team


IBM Watson Care Manager
Hi Angela
Calend
Thu
Due T
Due A
Overdue Actions 0 of 0
Unscheduled 0 of 0
Search Clients
Search Criteria
Search
Search Results
Request Emergency Access
Cancel

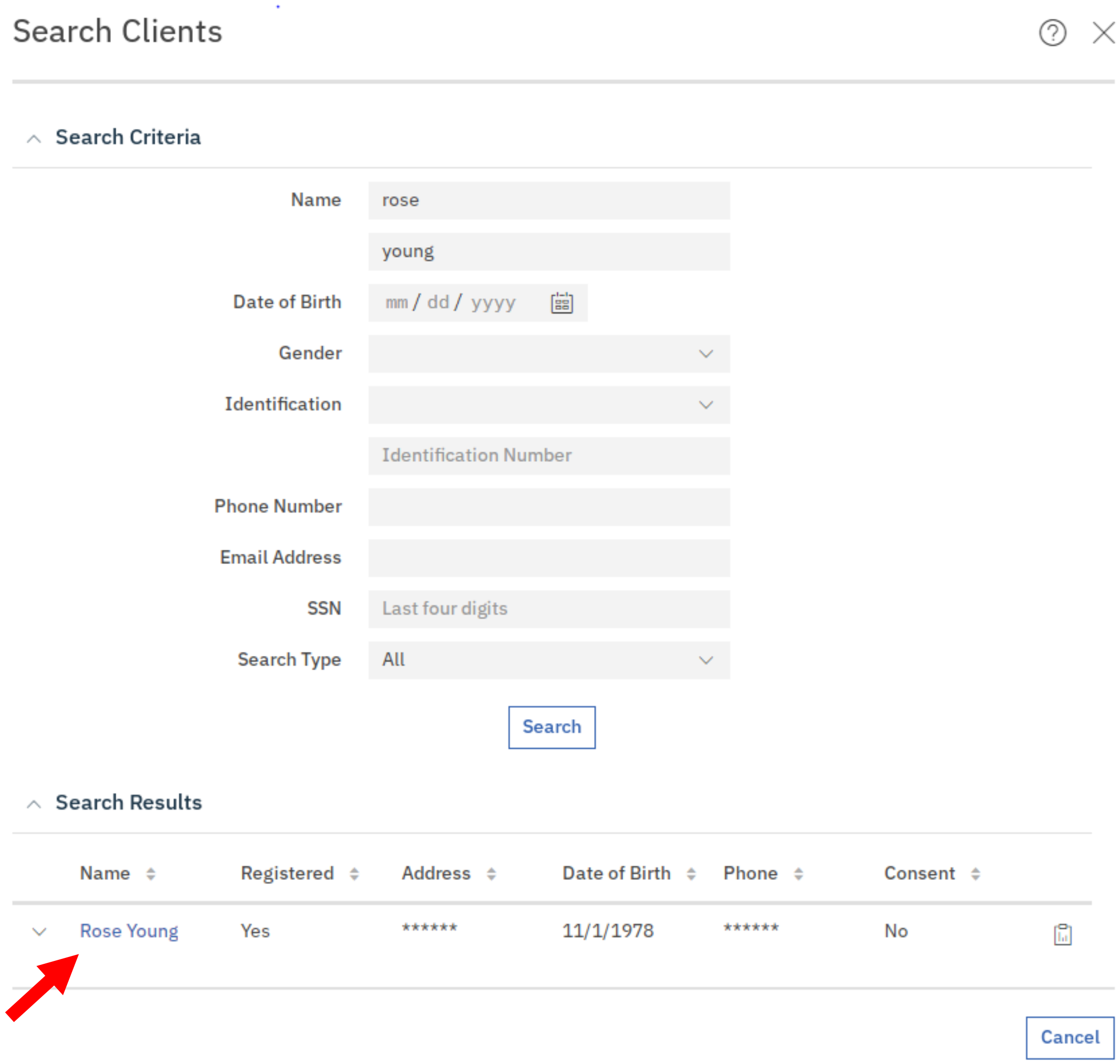
Name: Rose Young
Date of Birth: mm / dd / yyyy
Gender:
Identification:
Identification Number
Phone Number:
Email Address:
SSN: Last four digits
Search Type: All

Name	Registered	Address	Date of Birth	Phone	Consent
No Records					

1. Enter in client search details, in this case, we are searching for a client named ”Rose Young.”

2. Click here, or press enter on your keyboard, to search.

Once you click search, the client will appear in the “Search Results” section at the bottom of the pop-up, shown in the following slide.



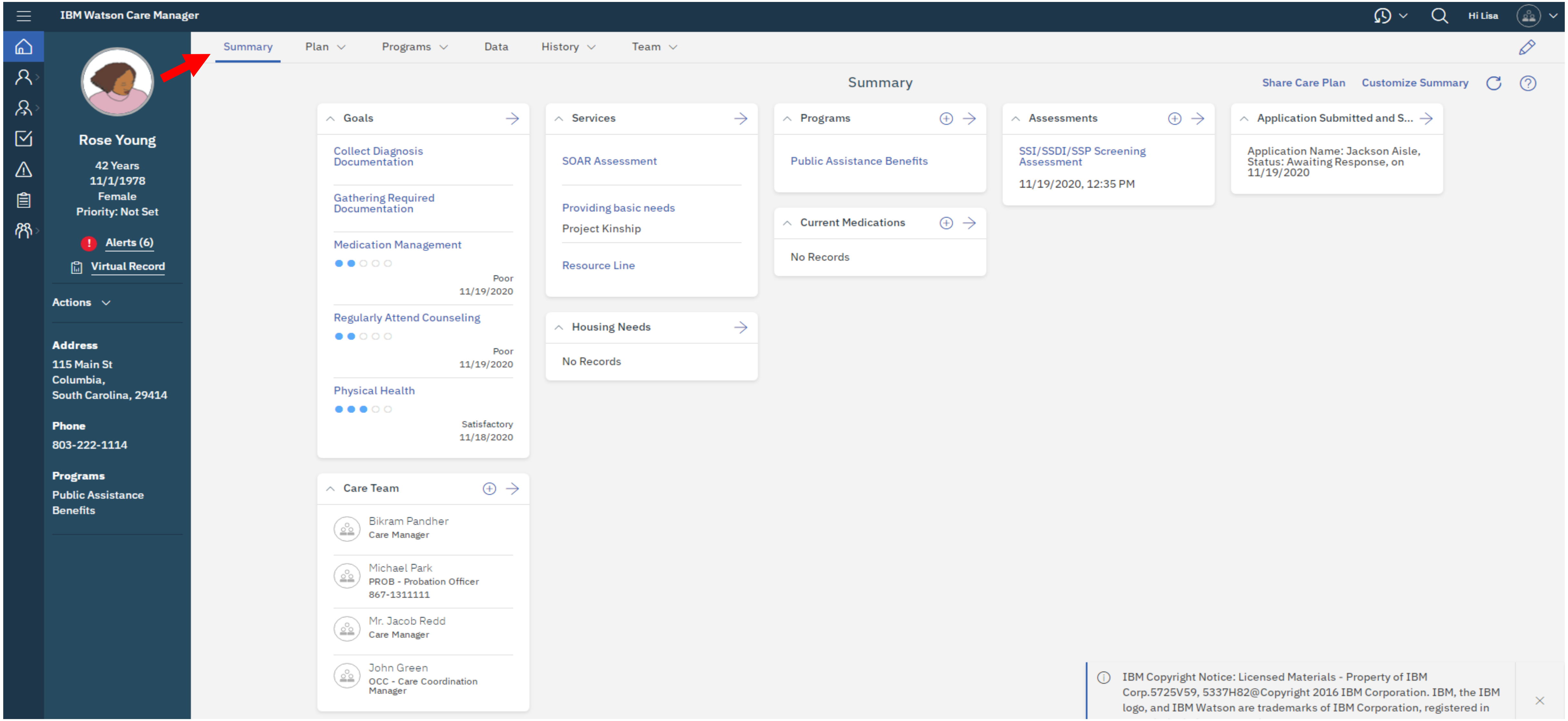
Search Clients
Search Criteria
Search
Search Results
Cancel

Name	rose young
Date of Birth	mm / dd / yyyy
Gender	
Identification	 Identification Number
Phone Number	
Email Address	
SSN	Last four digits
Search Type	All

Name	Registered	Address	Date of Birth	Phone	Consent
Rose Young	Yes	******	11/1/1978	******	No

Once you click search, the client will appear in the "Search Results" section at the bottom of the pop-up, shown in the following slide.

Step 1: Logging In | Step 2: Search for Client | Step 3: View Client VCR | Step 4: Register Client | Step 5: View Care-team Page | Step 6: Add Client to Care Team



Rose Young
42 Years
11/1/1978
Female
Priority: Not Set

Address
115 Main St
Columbia,
South Carolina, 29414

Phone
803-222-1114

Programs
Public Assistance Benefits

Summary

Goals
- Collect Diagnosis Documentation
- Gathering Required Documentation
- Medication Management — Poor, 11/19/2020
- Regularly Attend Counseling — Poor, 11/19/2020
- Physical Health — Satisfactory, 11/18/2020

Care Team
- Bikram Pandher, Care Manager
- Michael Park, PROB - Probation Officer, 867-1311111
- Mr. Jacob Redd, Care Manager
- John Green, OCC - Care Coordination Manager

Services
- SOAR Assessment
- Providing basic needs, Project Kinship
- Resource Line

Housing Needs
No Records

Programs
- Public Assistance Benefits

Current Medications
No Records

Assessments
- SSI/SSDI/SSP Screening Assessment
  11/19/2020, 12:35 PM

Application Submitted and S...
Application Name: Jackson Aisle, Status: Awaiting Response, on 11/19/2020

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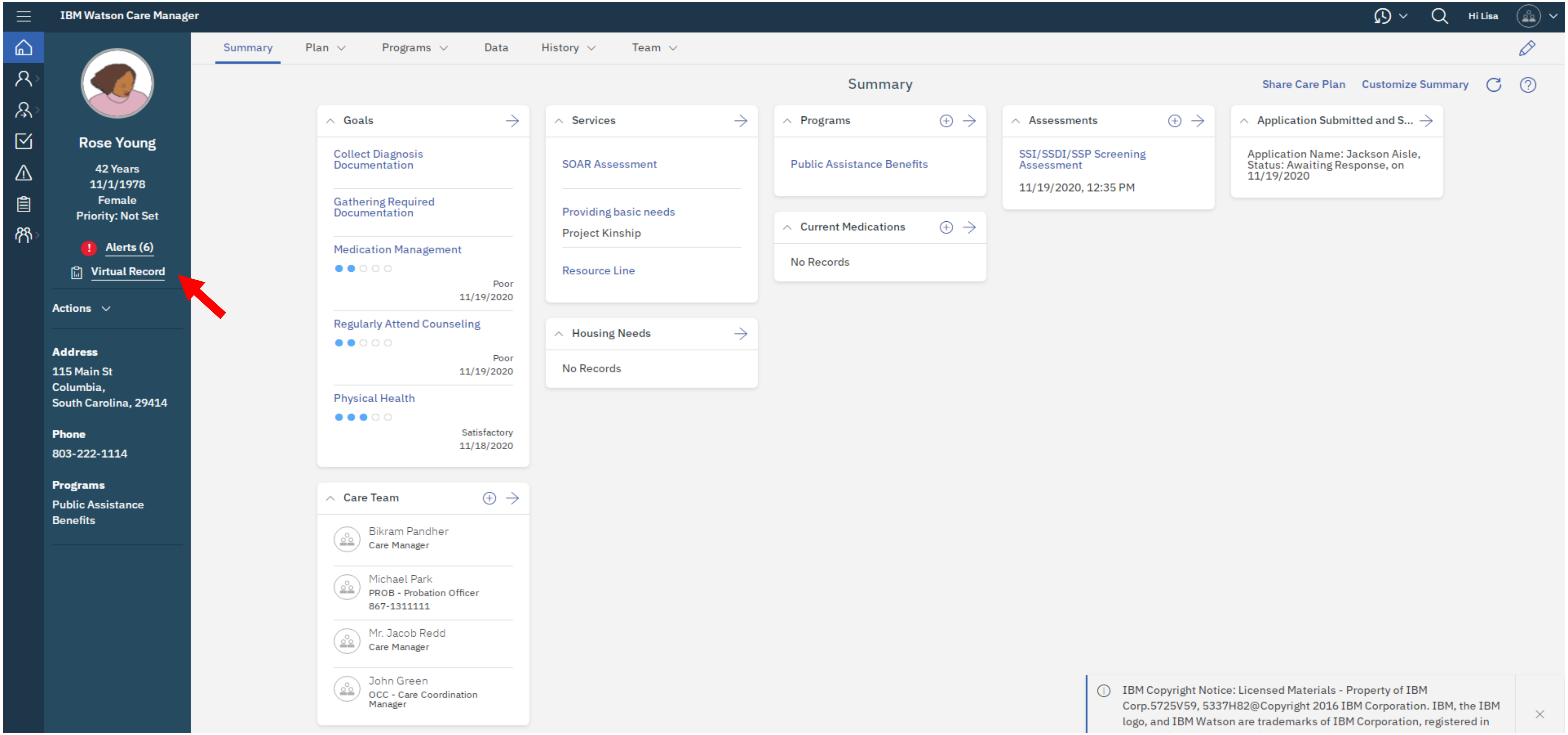
Once you click on the client’s name, the client’s Summary page will pop-up on the screen, as shown above.

Step 1: Logging In | Step 2: Search for Client | **Step 3: View Client VCR** | Step 4: Register Client | Step 5: View Care-team Page | Step 6: Add Client to Care Team



Rose Young
42 Years
11/1/1978
Female
Priority: Not Set
Alerts (6)
Virtual Record

Address
115 Main St
Columbia,
South Carolina, 29414

Phone
803-222-1114

Programs
Public Assistance Benefits

Summary

Goals
- Collect Diagnosis Documentation
- Gathering Required Documentation
- Medication Management ●●○○○ Poor 11/19/2020
- Regularly Attend Counseling ●●○○○ Poor 11/19/2020
- Physical Health ●●●○○ Satisfactory 11/18/2020

Care Team
- Bikram Pandher, Care Manager
- Michael Park, PROB - Probation Officer, 867-1311111
- Mr. Jacob Redd, Care Manager
- John Green, OCC - Care Coordination Manager

Services
- SOAR Assessment
- Providing basic needs, Project Kinship
- Resource Line

Housing Needs
No Records

Programs
Public Assistance Benefits

Current Medications
No Records

Assessments
SSI/SSDI/SSP Screening Assessment
11/19/2020, 12:35 PM

Application Submitted and S...
Application Name: Jackson Aisle, Status: Awaiting Response, on 11/19/2020

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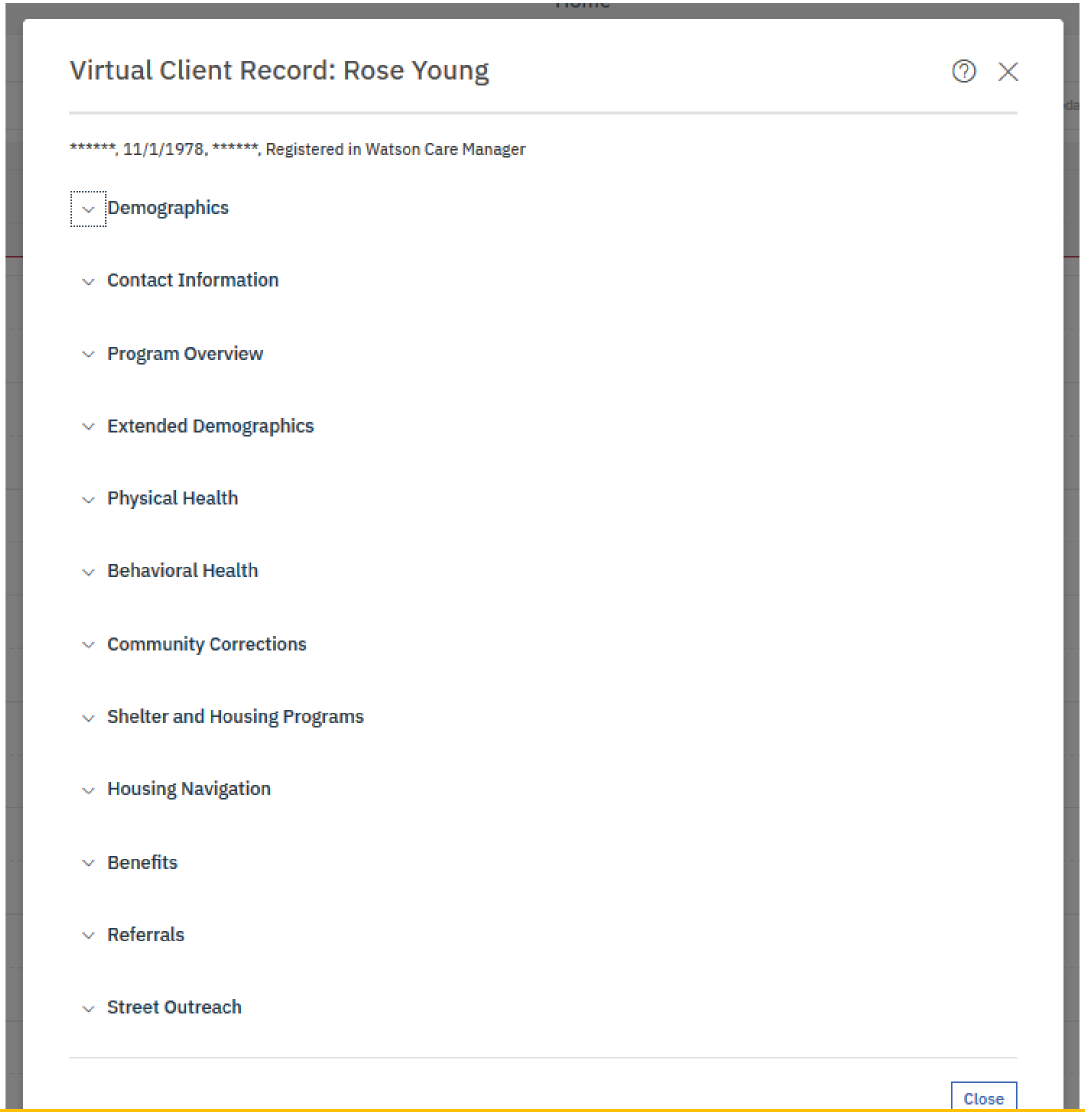
Once you click on the client’s name, the client’s VCR will pop-up on the screen, as shown in the following slide.
NOTE: the VCR automatically shows because our client, Rose, has already been registered into the system. If a Client is not yet



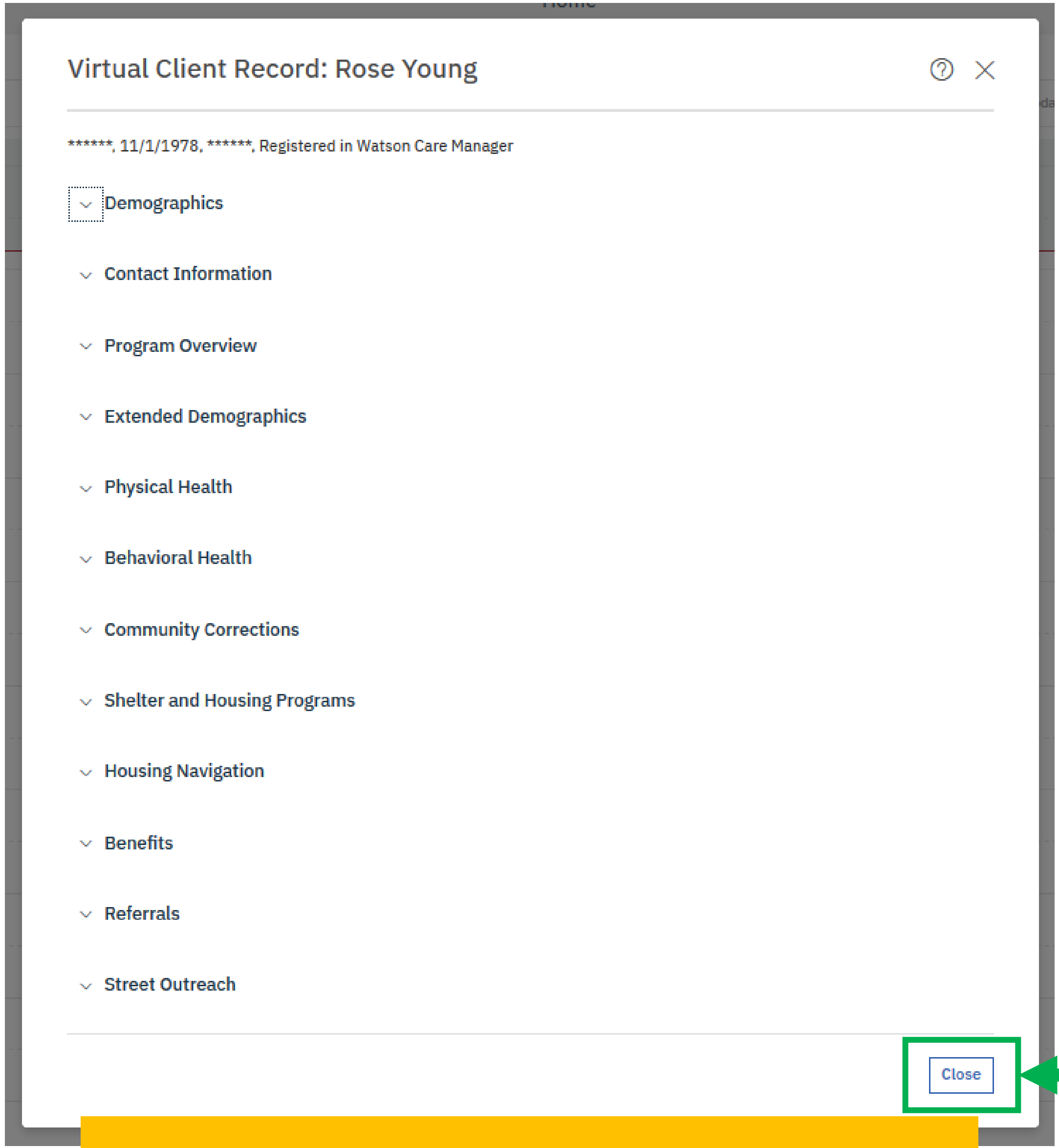
Virtual Client Record: Rose Young

******, 11/1/1978, ******, Registered in Watson Care Manager

- Demographics
- Contact Information
- Program Overview
- Extended Demographics
- Physical Health
- Behavioral Health
- Community Corrections
- Shelter and Housing Programs
- Housing Navigation
- Benefits
- Referrals
- Street Outreach

The VCR contains many subsections, indicated by the down shift icon, such as "Demographics," Contact Information," etc. To expand the subsections and view more details, simply click on them.

Step 1: Logging In | Step 2: Search for Client | **Step 3: View Client VCR** | Step 4: Register Client | Step 5: View Care-team Page | Step 6: Add Client to Care Team



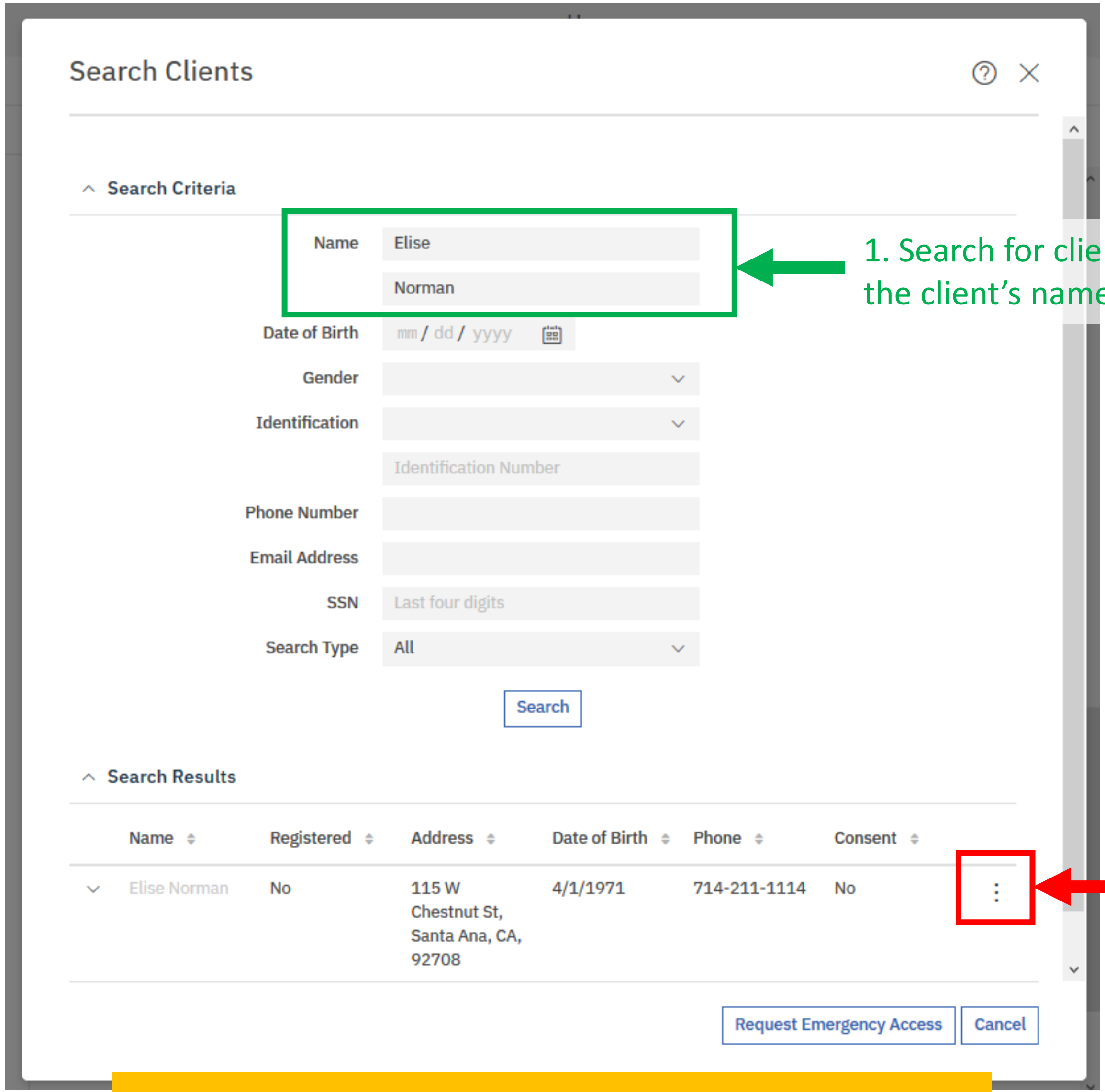
Virtual Client Record: Rose Young

******, 11/1/1978, ******, Registered in Watson Care Manager

Demographics
Contact Information
Program Overview
Extended Demographics
Physical Health
Behavioral Health
Community Corrections
Shelter and Housing Programs
Housing Navigation
Benefits
Referrals
Street Outreach
Close

1. Click here to close the Client's Virtual Client Record (VCR)

Closing the VCR will bring you back to the Search pop-up.



Search Clients

Search Criteria

Name: Elise
Norman
Date of Birth: mm / dd / yyyy
Gender:
Identification:
Identification Number
Phone Number:
Email Address:
SSN: Last four digits
Search Type: All

Search Results

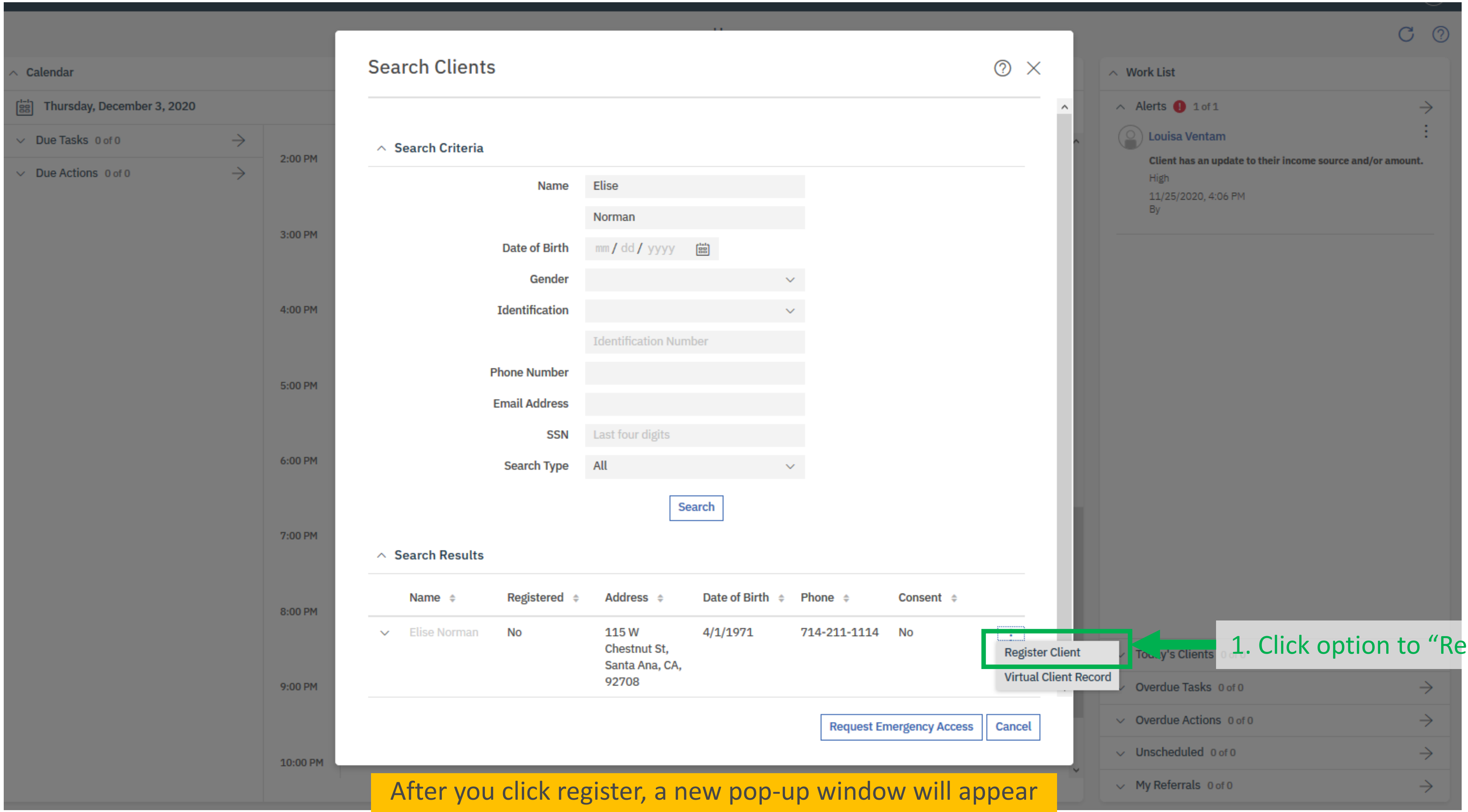
Name	Registered	Address	Date of Birth	Phone	Consent
Elise Norman	No	115 W Chestnut St, Santa Ana, CA, 92708	4/1/1971	714-211-1114	No

1. Search for client to register, in this case, the client's name is "Elise Norman"

2. Click these three dots to expand options to register client or view their VCR

The expanded options will be shown on the next slide.

Step 1: Logging In | Step 2: Search for Client | Step 3: View Client VCR | **Step 4: Register Client** | Step 5: View Care-team Page | Step 6: Add Client to Care Team


Calendar
Thursday, December 3, 2020
Due Tasks 0 of 0
Due Actions 0 of 0
2:00 PM
3:00 PM
4:00 PM
5:00 PM
6:00 PM
7:00 PM
8:00 PM
9:00 PM
10:00 PM
Work List
Alerts 1 of 1
Today's Clients
Overdue Tasks 0 of 0
Overdue Actions 0 of 0
Unscheduled 0 of 0
My Referrals 0 of 0
Search Criteria
Search
Search Results
Register Client
Virtual Client Record
Request Emergency Access
Cancel

Louisa Ventam

Client has an update to their income source and/or amount.

High

11/25/2020, 4:06 PM

By

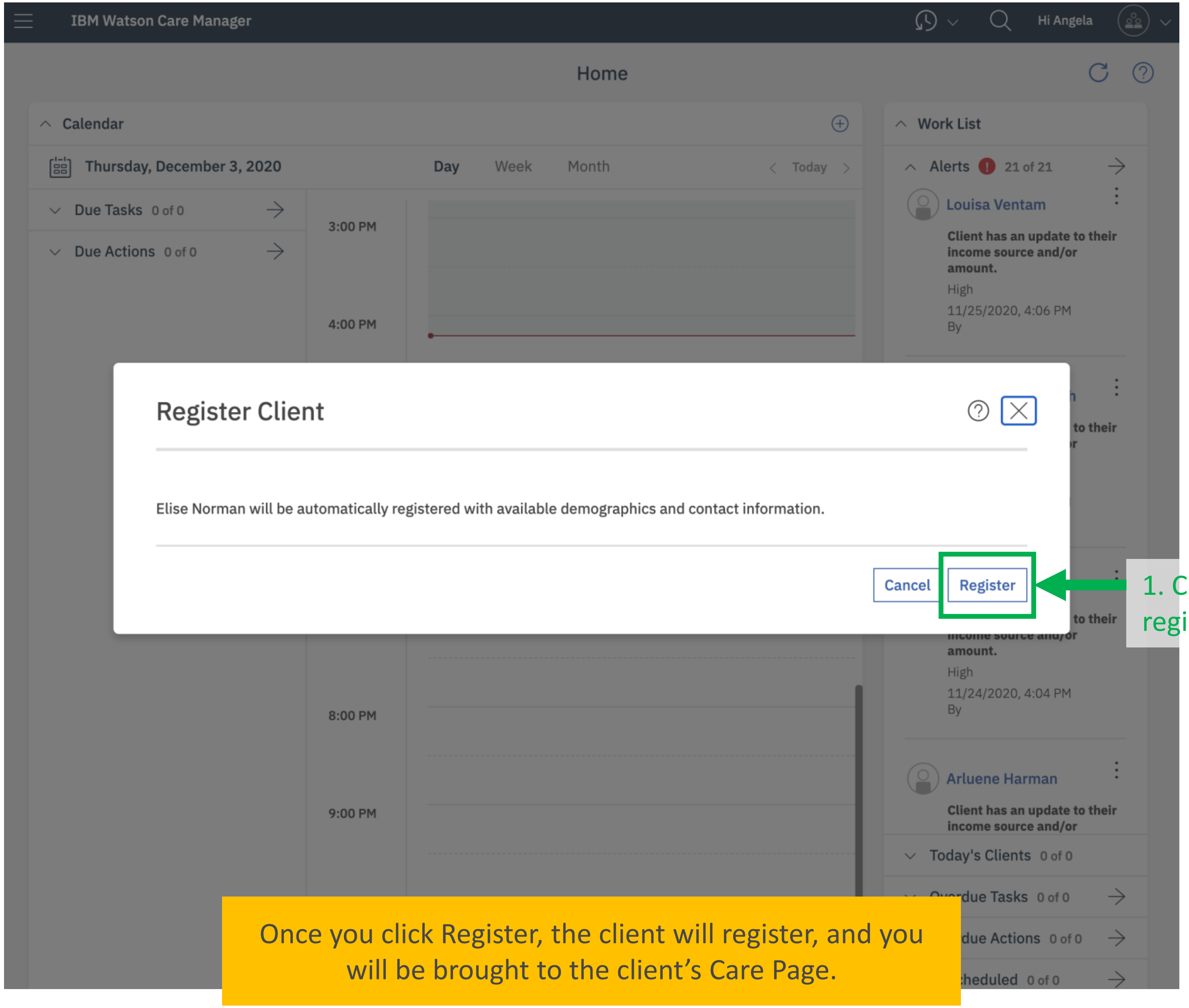
Search Clients

Name	Elise Norman
Date of Birth	mm / dd / yyyy
Gender	
Identification	
	Identification Number
Phone Number	
Email Address	
SSN	Last four digits
Search Type	All

Name	Registered	Address	Date of Birth	Phone	Consent
Elise Norman	No	115 W Chestnut St, Santa Ana, CA, 92708	4/1/1971	714-211-1114	No

1. Click option to “Register Client”

After you click register, a new pop-up window will appear confirming the registration. This pop-up is shown on the next slide.

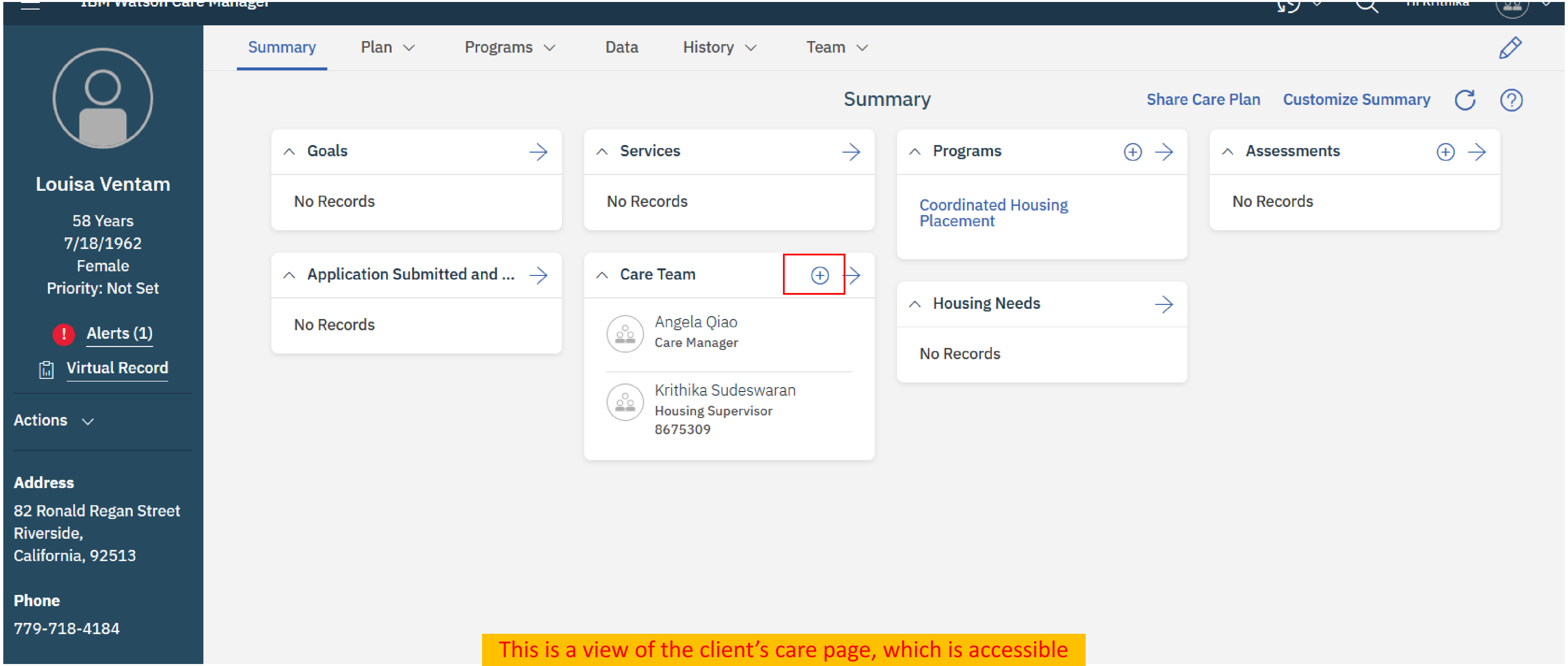

IBM Watson Care Manager
Hi Angela
Home
Calendar
Thursday, December 3, 2020
Day
Week
Month
Today
Due Tasks 0 of 0
Due Actions 0 of 0
3:00 PM
4:00 PM
8:00 PM
9:00 PM
Work List
Alerts 21 of 21
Louisa Ventam
Client has an update to their income source and/or amount.
High
11/25/2020, 4:06 PM
By
11/24/2020, 4:04 PM
Arluene Harman
Today's Clients 0 of 0
Overdue Tasks 0 of 0
Overdue Actions 0 of 0
Scheduled 0 of 0
Register Client
Cancel
Register

Elise Norman will be automatically registered with available demographics and contact information.

1. Click the "Register" button to register the client.

Once you click Register, the client will register, and you will be brought to the client's Care Page.

Step 1: Logging In | Step 2: Search for Client | Step 3: View Client VCR | Step 4: Register Client | **Step 5: View Care-team Page** | Step 6: Add Client to Care Team


IBM Watson Care Manager
Hi Krithika
Summary
Plan
Programs
Data
History
Team
Share Care Plan
Customize Summary

Louisa Ventam

58 Years
7/18/1962
Female
Priority: Not Set

Alerts (1)
Virtual Record

Actions

Address
82 Ronald Regan Street
Riverside,
California, 92513

Phone
779-718-4184

Summary

Goals
No Records

Services
No Records

Programs
Coordinated Housing Placement

Assessments
No Records

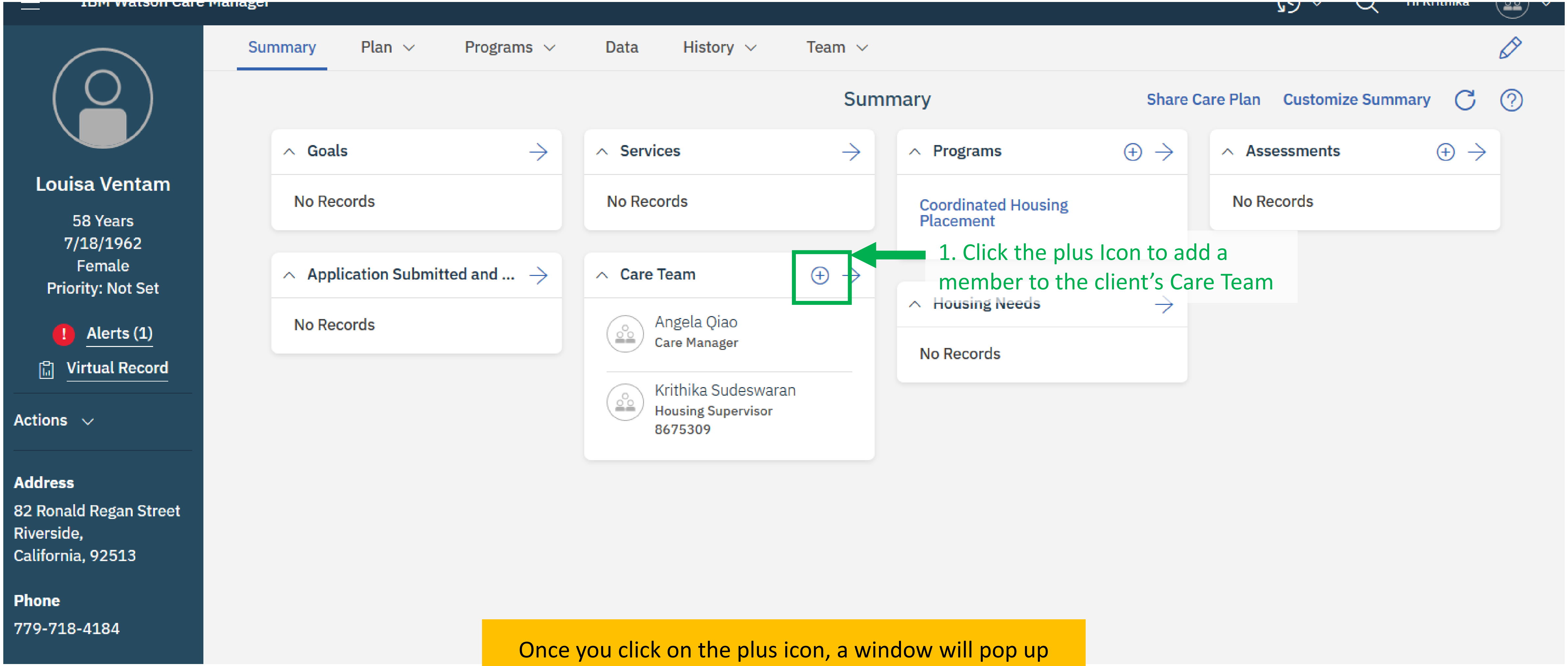
Application Submitted and ...
No Records

Care Team
Angela Qiao
Care Manager
Krithika Sudeswaran
Housing Supervisor
8675309

Housing Needs
No Records

This is a view of the client’s care page, which is accessible for registered clients. You can also view the client’s care page by

Step 1: Logging In | Step 2: Search for Client | Step 3: View Client VCR | Step 4: Register Client | Step 5: View Care-team Page | **Step 6: Add Client to Care Team**


Summary
Plan
Programs
Data
History
Team
Share Care Plan
Customize Summary
Alerts (1)
Virtual Record
Actions

Louisa Ventam
58 Years
7/18/1962
Female
Priority: Not Set

Address
82 Ronald Regan Street
Riverside,
California, 92513

Phone
779-718-4184

Summary

Goals	Services	Programs	Assessments
No Records	No Records	Coordinated Housing Placement	No Records

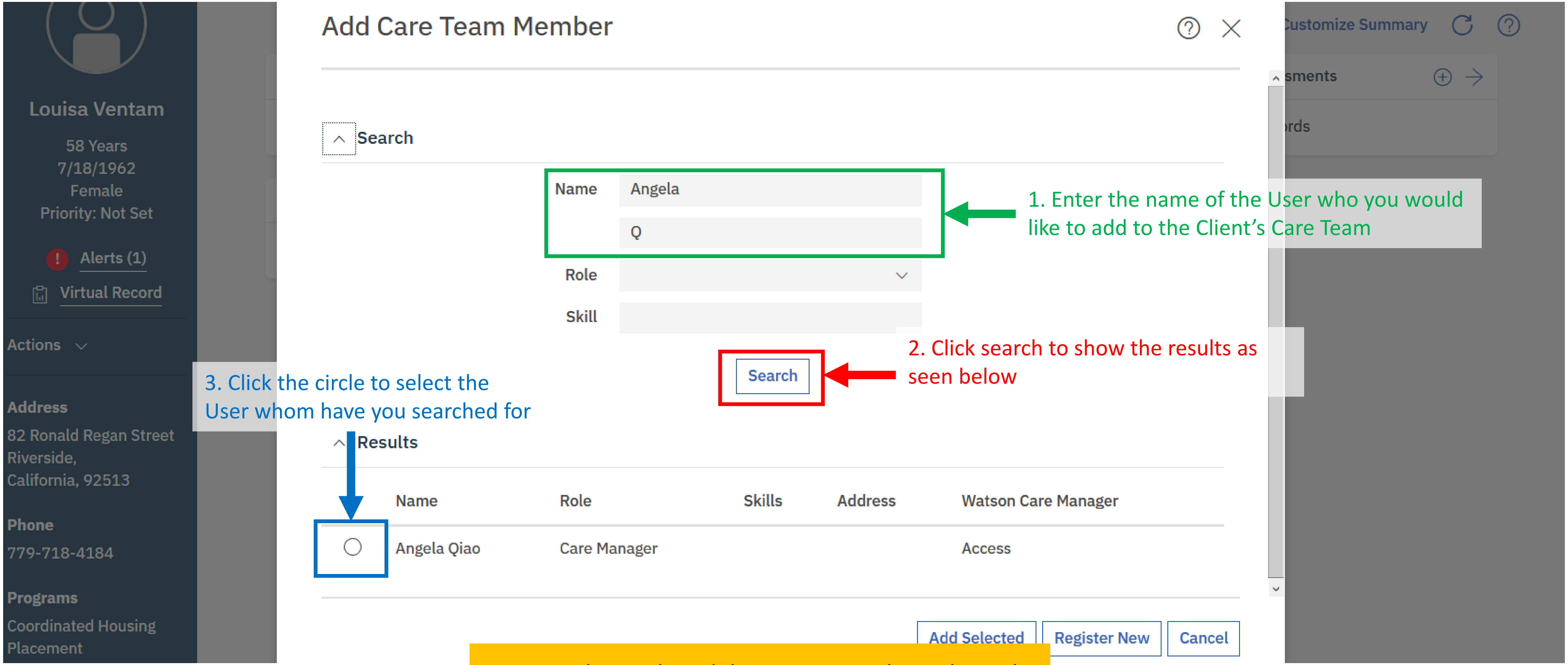
Application Submitted and ...
No Records

Care Team
Angela Qiao
Care Manager
Krithika Sudeswaran
Housing Supervisor
8675309

Housing Needs
No Records

1. Click the plus Icon to add a member to the client's Care Team

Once you click on the plus icon, a window will pop up allowing you to search for Care Team Members to add.



Louisa Ventam
58 Years
7/18/1962
Female
Priority: Not Set

Address
82 Ronald Regan Street
Riverside,
California, 92513

Phone
779-718-4184

Programs
Coordinated Housing
Placement

Add Care Team Member

Search

Name: Angela
Q
Role:
Skill:

Results

	Name	Role	Skills	Address	Watson Care Manager
○	Angela Qiao	Care Manager			Access

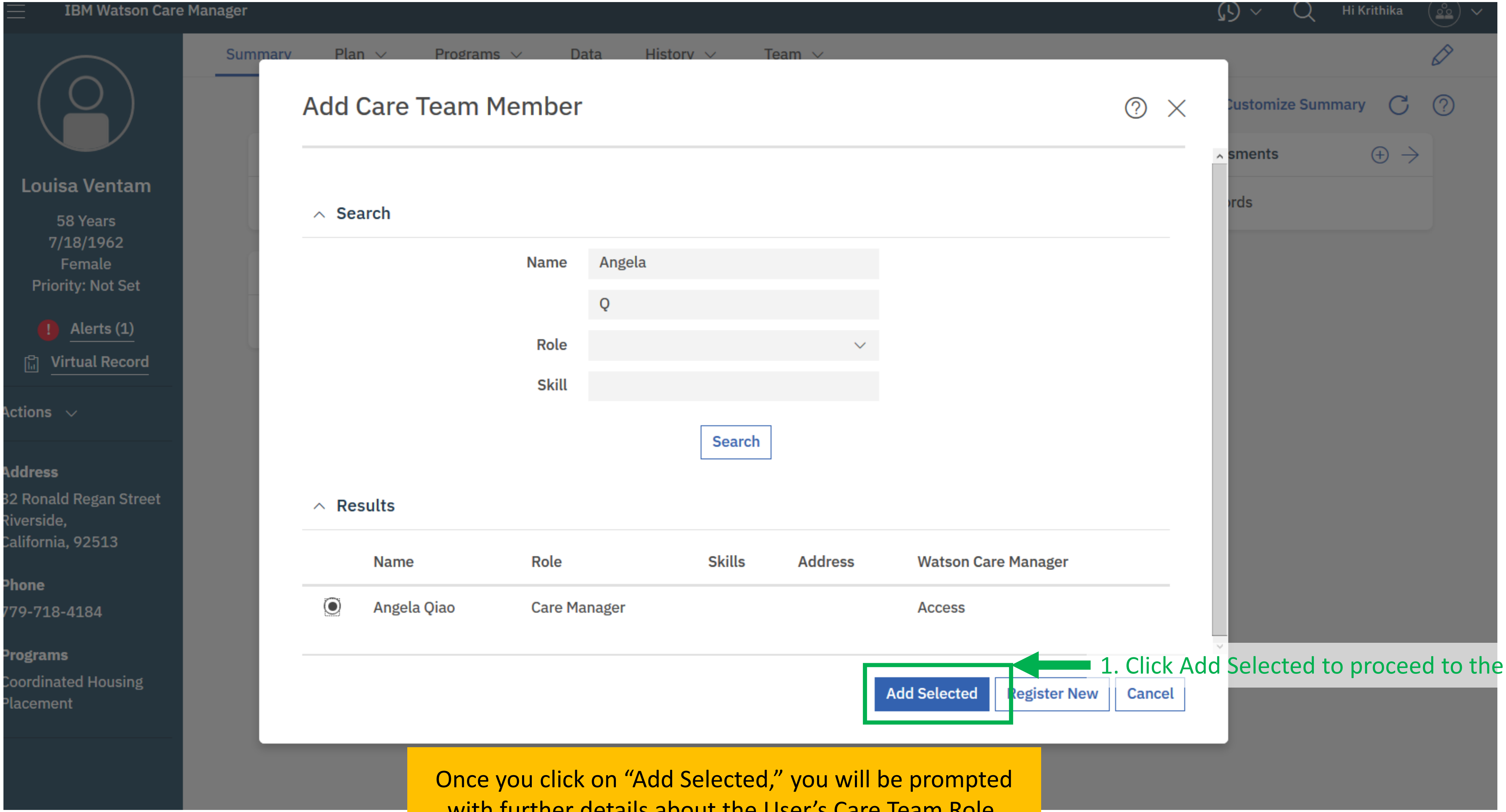
Alerts (1)
Virtual Record
Actions
Search
Add Selected
Register New
Cancel
ustomize Summary
sments
rds

1. Enter the name of the User who you would like to add to the Client's Care Team

2. Click search to show the results as seen below

3. Click the circle to select the User whom have you searched for

Once you have selected the User in step three, the circle will become filled, as shown in the next slide.



IBM Watson Care Manager

Hi Krithika

Summary Plan Programs Data History Team

Louisa Ventam

58 Years
7/18/1962
Female
Priority: Not Set

Alerts (1)
Virtual Record
Actions

Address
32 Ronald Regan Street
Riverside,
California, 92513

Phone
779-718-4184

Programs
Coordinated Housing Placement

Add Care Team Member

Search

Name: Angela

Q

Role:

Skill:

Search

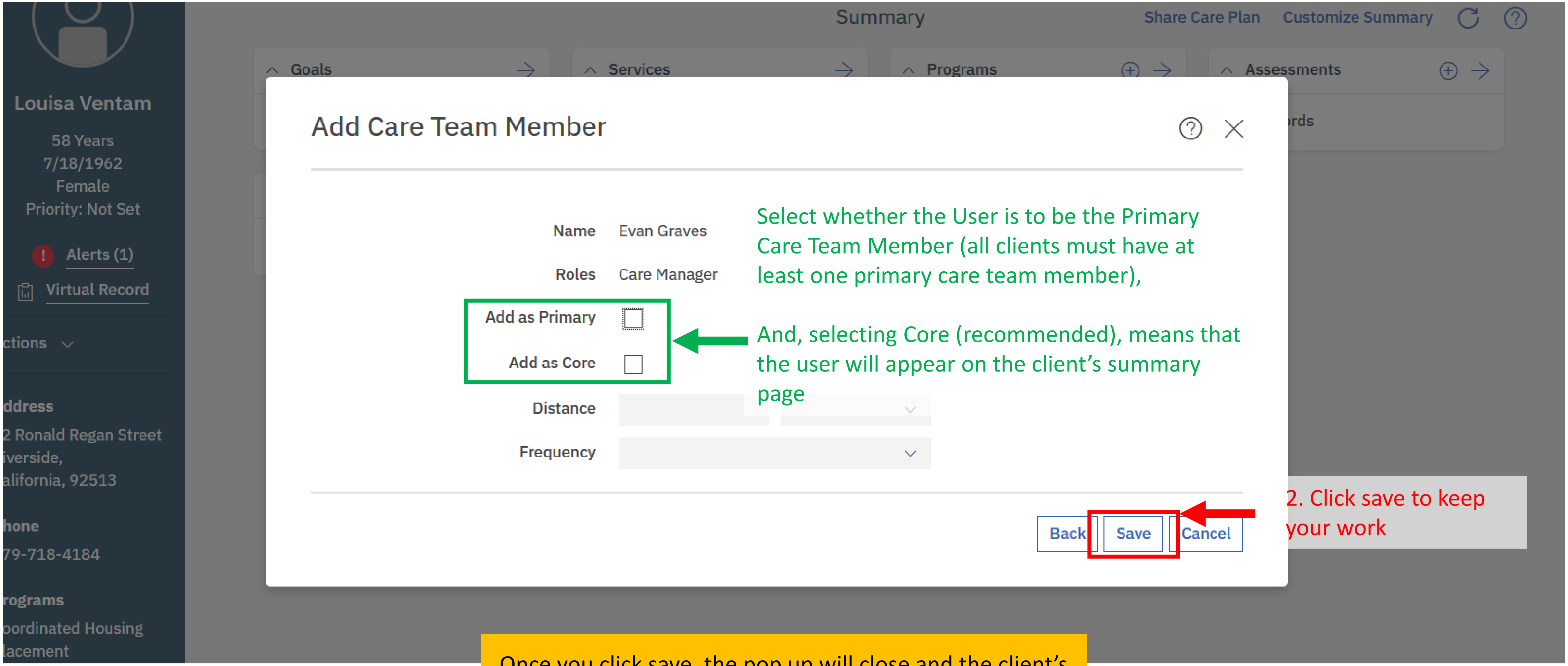
Results

	Name	Role	Skills	Address	Watson Care Manager
●	Angela Qiao	Care Manager			Access

1. Click Add Selected to proceed to the next step

Once you click on “Add Selected,” you will be prompted with further details about the User’s Care Team Role.

Step 1: Logging In | Step 2: Search for Client | Step 3: View Client VCR | Step 4: Register Client | Step 5: View Care-team Page | **Step 6: Add Client to Care Team**


Summary
Share Care Plan
Customize Summary
Goals
Services
Programs
Assessments
rds
Alerts (1)
Virtual Record
ctions
Back
Save
Cancel

Louisa Ventam
58 Years
7/18/1962
Female
Priority: Not Set

ddress
2 Ronald Regan Street
iverside,
alifornia, 92513

hone
79-718-4184

rograms
oordinated Housing
lacement

Add Care Team Member

Name: Evan Graves
Roles: Care Manager
Add as Primary ☐
Add as Core ☐
Distance:
Frequency:

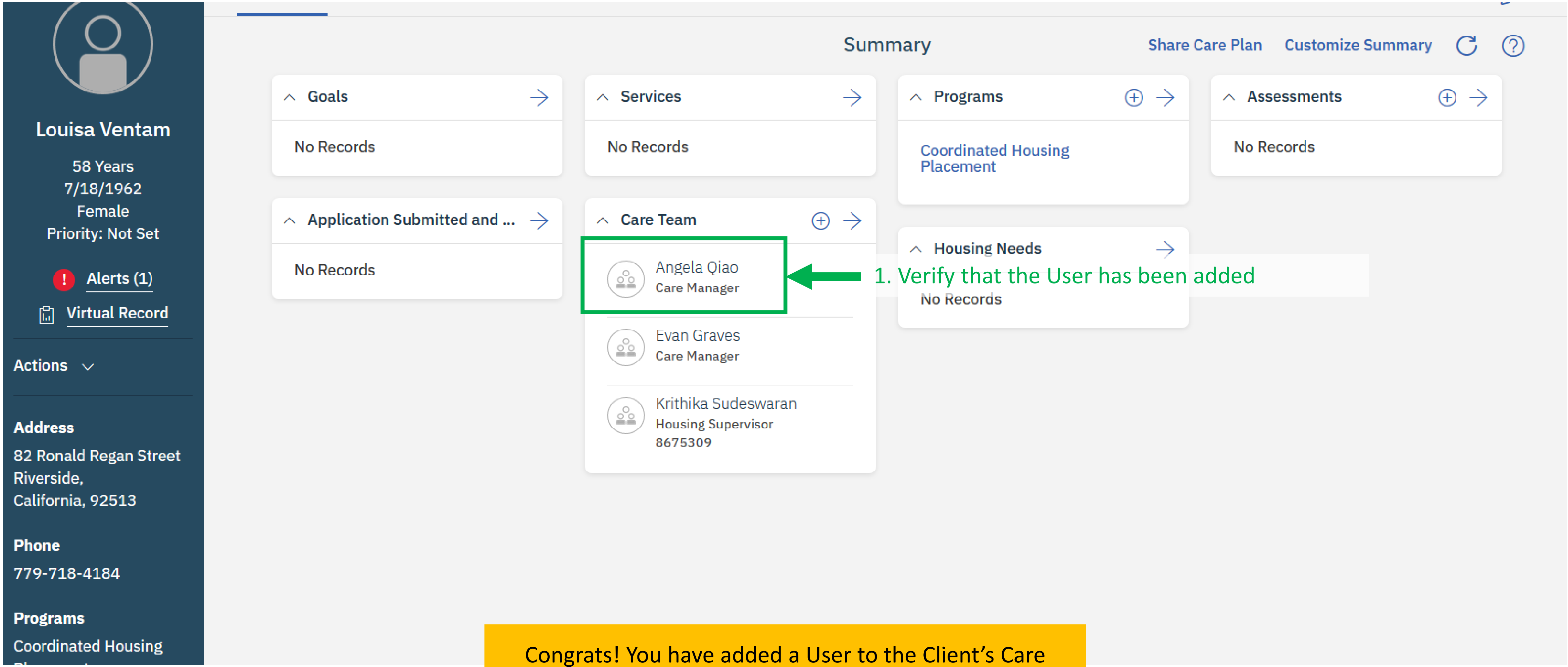
Select whether the User is to be the Primary Care Team Member (all clients must have at least one primary care team member),

And, selecting Core (recommended), means that the user will appear on the client's summary page

2. Click save to keep your work

Once you click save, the pop up will close and the client's Care Page will display, as on the next slide.

Step 1: Logging In | Step 2: Search for Client | Step 3: View Client VCR | Step 4: Register Client | Step 5: View Care-team Page | **Step 6: Add Client to Care Team**



Louisa Ventam
58 Years
7/18/1962
Female
Priority: Not Set

Alerts (1)
Virtual Record

Actions

Address
82 Ronald Regan Street
Riverside,
California, 92513

Phone
779-718-4184

Programs
Coordinated Housing

Summary
Share Care Plan | Customize Summary

Goals
No Records

Services
No Records

Programs
Coordinated Housing Placement

Assessments
No Records

Application Submitted and ...
No Records

Care Team
Angela Qiao
Care Manager

Evan Graves
Care Manager

Krithika Sudeswaran
Housing Supervisor
8675309

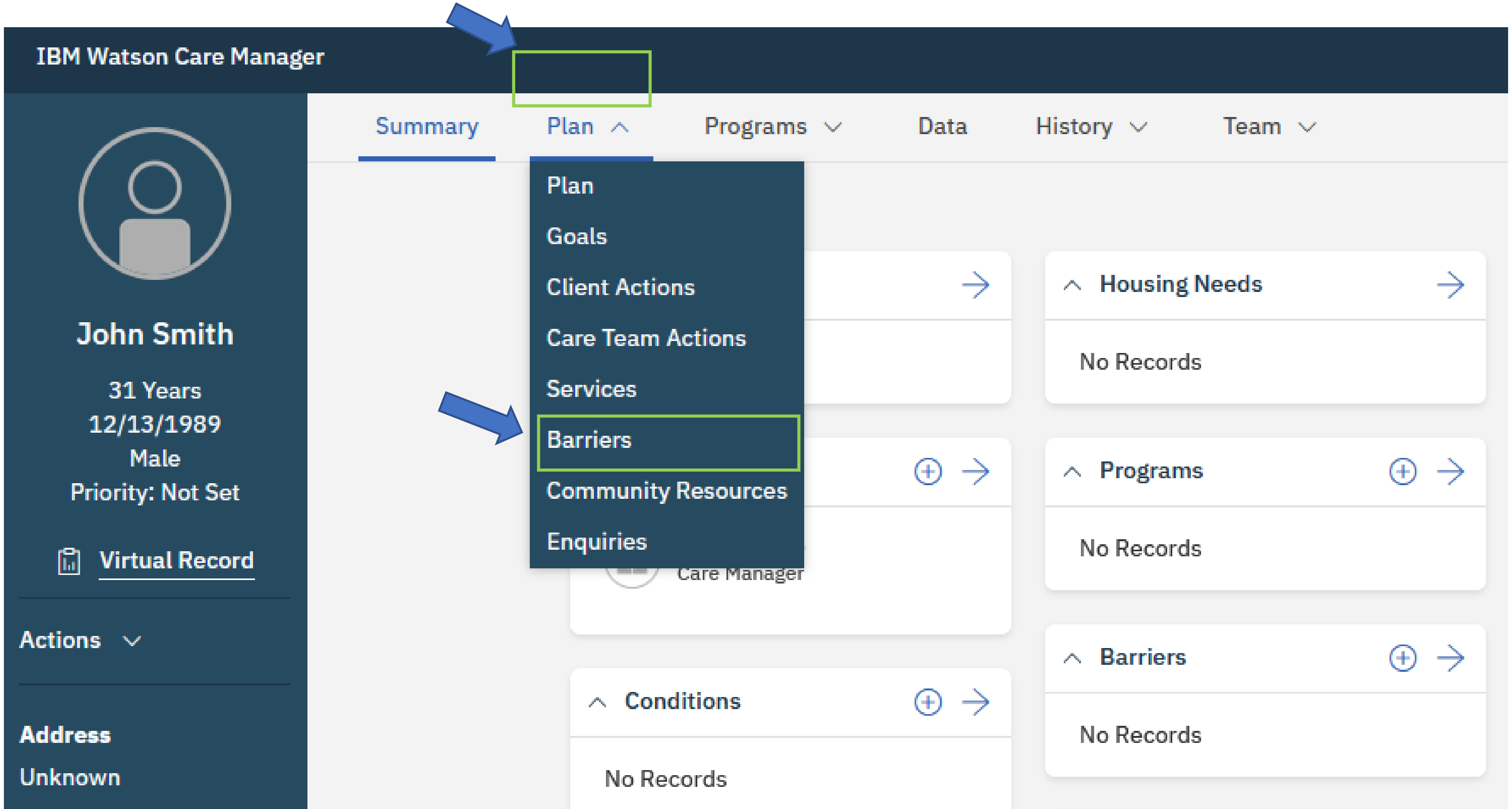
Housing Needs
No Records

1. Verify that the User has been added

Congrats! You have added a User to the Client’s Care Team

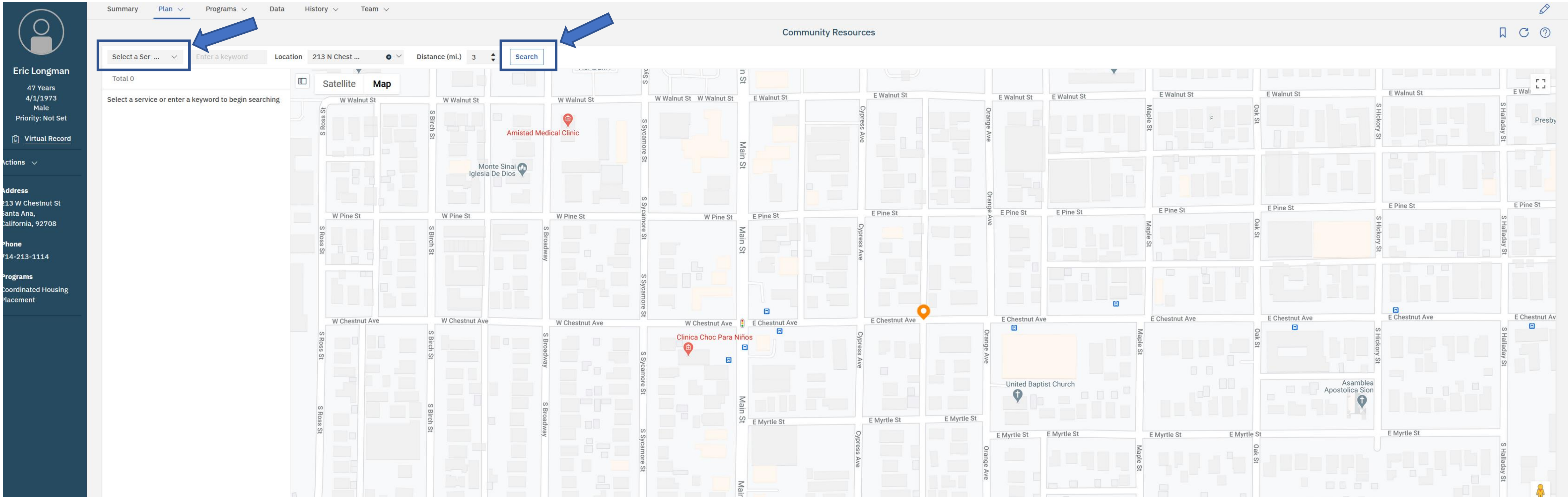
Navigating to Community Resources

You can navigate to the Community Resources page (to make enquiries for services) by following these directions. From the Client Summary page: click ‘Plan’, followed by ‘Community Resources’ from the dropdown. This will bring you to the Community Resources page where you can then search for the Provider’s that offer the services you are looking for.


IBM Watson Care Manager
Summary
Plan
Programs
Data
History
Team
Plan
Goals
Client Actions
Care Team Actions
Services
Barriers
Community Resources
Enquiries
John Smith
31 Years
12/13/1989
Male
Priority: Not Set
Virtual Record
Actions
Address
Unknown
Care Manager
Housing Needs
No Records
Programs
No Records
Barriers
No Records
Conditions
No Records

Navigating to Community Resources

From the Community Resources page, you can select a Service from the highlighted dropdown and click Search to view Providers in the area that offer the services on the Client's Care Plan.


Summary
Plan
Programs
Data
History
Team
Community Resources
Select a Ser ...
Enter a keyword
Location
213 N Chest ...
Distance (mi.)
3
Search
Satellite
Map
Amistad Medical Clinic
Monte Sinai Iglesia De Dios
Clinica Choc Para Niños
United Baptist Church
Asamblea Apostolica Sion
W Walnut St
E Walnut St
W Pine St
E Pine St
W Chestnut Ave
E Chestnut Ave
E Myrtle St
Main St

Eric Longman
47 Years
4/1/1973
Male
Priority: Not Set

Virtual Record

ctions

ddress
13 W Chestnut St
anta Ana,
alifornia, 92708

hone
14-213-1114

rograms
oordinated Housing
lacement

Total 0

Select a service or enter a keyword to begin searching

Watson Care Manager
Training Session 1

You have now finished WCM Training Session 1 How to Search, Add and View a Client

CarePlus
PROGRAM