



PROGRAM ENROLLMENT, CARE  
PLANNING, PROGRAM AND CPP EXIT

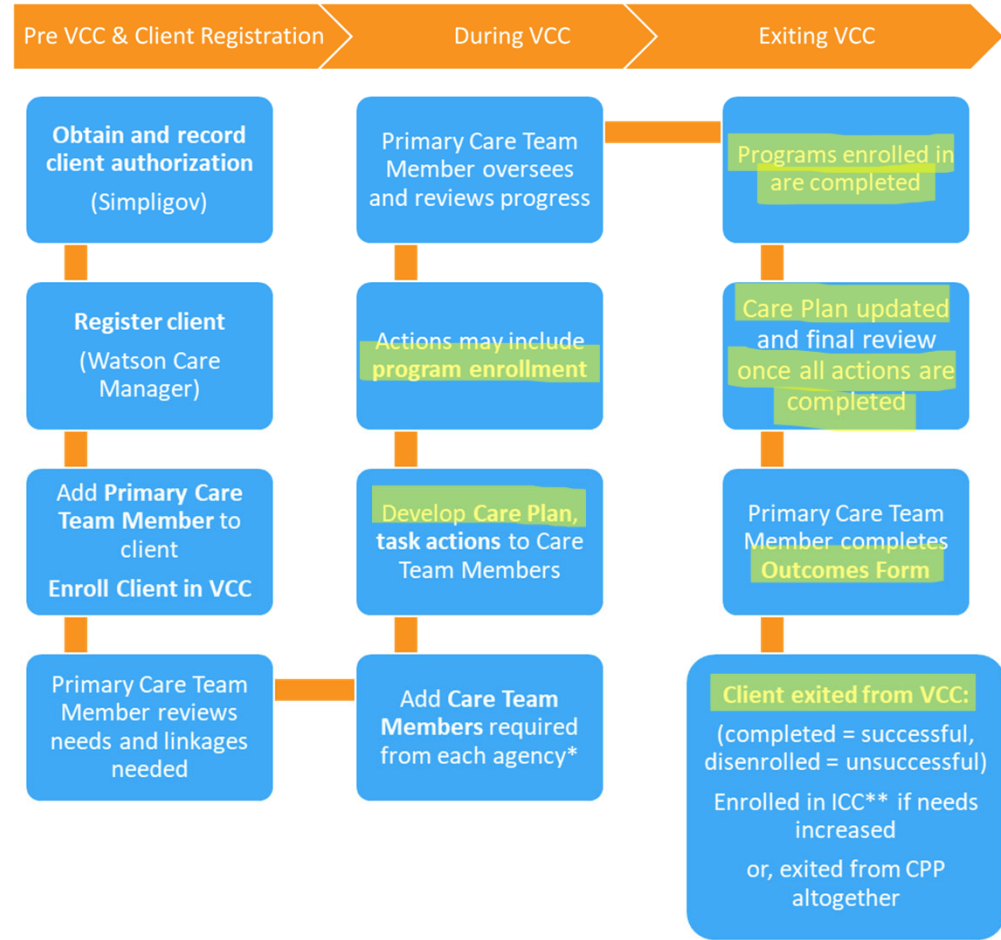
Watson Care Manager  
Training Session

## WORKFLOW PROCESSES

- Assigning and enrolling a client in to a WCM program (focus on VCC & ICC)
- Creating a clients Care Plan
  - Adding goals and actions (predesigned for CPP and option to add bespoke)
  - Assigning actions to care team members
  - Updating on progress and closing out actions
- Exiting a client from WCM program/s
  - Reviewing client care plan and goals before exit
  - Completing an Outcomes form for the client
  - Deactivating the client once they have exited all WCM programs and are no longer receiving care coordination under the Care Plus Program

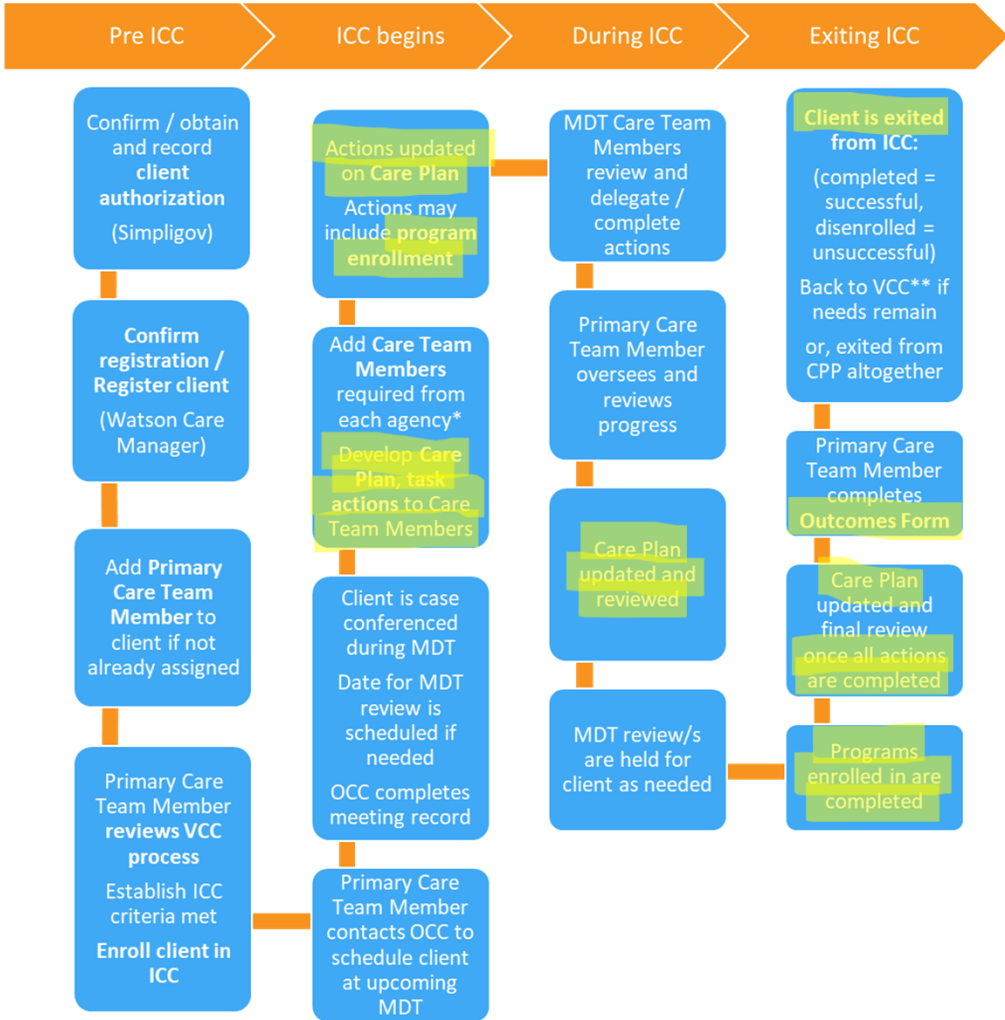
### Virtual Care Coordination (VCC) Workflow

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.



### Intense Care Coordination (ICC) Workflow

A client may enter ICC after a period of receiving VCC when needs have increased, or they may be enrolled directly when ICC criteria has already been met.





## ASSIGNING AND ENROLLING CLIENTS IN PROGRAMS

There are 2 steps to entering a client in a WCM program

- **Step 1 is assigning the program:**
  - Assignment is in the case of programs with certain eligibility criteria, where the client may need an assessment to determine their eligibility (not currently being used), prior to program acceptance and enrollment
- **Step 2 is enrollment in to the program**
  - Any WCM program can proceed straight to enrollment (as we are not currently completing any eligibility assessments)

Both steps, the program assignment and enrollment, must be completed

# STEP 1 – ASSIGN PROGRAM: SELECT THE ‘PROGRAMS’ TAB AND CLICK ‘ASSIGN’

The screenshot displays the IBM Watson Care Manager web application. The browser address bar shows the URL: <https://care-manager02.us-south.wh-wcm.watson-health.ibm.com/wcm/mtinit/7392532/02>. The application header includes the IBM Watson Care Manager logo, a search bar, and the user name 'Hi Melanie'. The main navigation tabs are Summary, Plan, Programs (selected), Data, History, and Team. The 'Programs' tab is highlighted with an orange arrow. Below the tabs, the 'Programs' section is visible, featuring an 'Assign' button and a refresh icon, both highlighted with orange arrows. The main content area displays a table with the following data:

Name	Status	Updated By
Coordinated Housing Placement	Assigned on 2/26/2021 3:32 PM	Natalie Dempster
Custody and Re-Entry	Enrolled on 12/2/2020 1:53 PM	Krithika Sudeswaran
Custody and Re-Entry	Disenrolled on 12/2/2020 12:33 PM	Krithika Sudeswaran
Custody and Re-Entry	Disenrolled on 12/2/2020 9:52 AM	Krithika Sudeswaran
Custody and Re-Entry	Disenrolled on 12/1/2020 11:20 PM	Krithika Sudeswaran

The left sidebar contains the user profile for Anna Joe, including her name, age (51 Years), date of birth (4/1/1970), gender (Male), and priority (Not Set). It also shows 6 alerts, a virtual record icon, and an address: 230 Cookie St, Santa Ana, California, 98192. The phone number is 101-230-1114. The Windows taskbar at the bottom shows the search bar and various application icons, with the system clock indicating 10:13 AM on 6/2/2021.

# ASSIGN THE RELEVANT PROGRAM, ENTER DATE STARTED, CLICK SAVE

The screenshot displays the IBM Watson Care Manager web application. The browser address bar shows the URL: <https://care-manager02.us-south.wh-wcm.watson-health.ibm.com/wcm/mtinit/7392532/02>. The application header includes the user name "Hi Melanie" and navigation tabs for "Summary", "Plan", "Programs", "Data", "History", and "Team".

The "Assign Program" dialog box is the central focus, containing the following fields:

- Program \***: A dropdown menu with "ICC - Intense Care Coordination" selected.
- Date \***: A date and time picker showing "06 / 02 / 2021" and "01:16 PM".
- Comments**: A large text area for entering notes.

At the bottom right of the dialog box are "Save" and "Cancel" buttons. A red asterisk and the text "\* required field" are positioned to the right of the Program and Date fields. The background interface shows a user profile for "Anna Joe" (51 Years, 4/1/1970, Male, Priority: Not Set) and a list of actions.

The Windows taskbar at the bottom shows the search bar with "Type here to search" and several application icons. The system tray on the right indicates the time is 10:17 AM on 6/2/2021.

# STEP 2 – PROGRAM ENROLLMENT: PROCEED STRAIGHT TO ENROLLMENT BY UPDATING PROGRAM STATUS

The screenshot shows the IBM Watson Care Manager interface for a patient named Anna Joe. The 'Programs' tab is selected, displaying a table of programs. An orange arrow points to the 'Update Status' button in the dropdown menu for the first program.

Name	Status	Updated By
ICC - Intense Care Coordination	Assigned on 6/2/2021 1:16 PM	Melanie McQueen
Coordinated Housing Placement	Assigned on 2/26/2021 3:32 PM	Natalie Dempster
Custody and Re-Entry	Enrolled on 12/2/2020 1:53 PM	Krithika Sudeswaran
Custody and Re-Entry	Disenrolled on 12/2/2020 12:33 PM	Krithika Sudeswaran
Custody and Re-Entry	Disenrolled on 12/2/2020 9:52 AM	Krithika Sudeswaran
Custody and Re-Entry	Disenrolled on 12/1/2020 11:20 PM	Krithika Sudeswaran

Left sidebar information for Anna Joe:

- 51 Years
- 4/1/1970
- Male
- Priority: Not Set
- Alerts (6)
- Virtual Record
- Address: 230 Cookie St, Santa Ana, California, 98192
- Phone: 101-230-1114

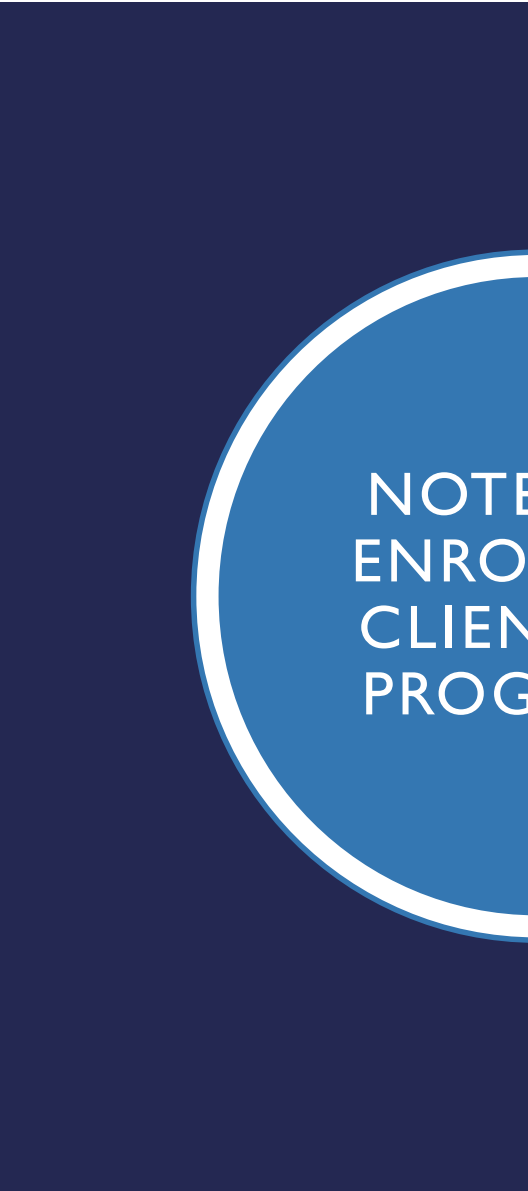
# SELECT ENROLLED, DATE STARTED AND CLICK SAVE

The screenshot displays the IBM Watson Care Manager web application. A modal window titled "Update ICC - Intense Care Coordination Status" is open, showing the following fields:

- Current Status:** Assigned
- New Status \***: A dropdown menu with "Enrolled" selected.
- Date \***: A date and time picker showing "06 / 02 / 2021" and "01 : 26 PM".
- Graduated:** A date picker showing "mm / dd / yyyy".
- Comments:** A text area for entering notes.

At the bottom right of the modal are "Save" and "Cancel" buttons. A red asterisk and the text "\* required field" are visible next to the "New Status" and "Date" fields. The background shows the user profile for Anna Joe and navigation tabs for Summary, Plan, Programs, Data, History, and Team.





## NOTES ON ENROLLING CLIENTS IN PROGRAMS

- Program enrollments are one of the key **linkages** measured in the Care Plus Program
  - Enrollment timescales are important – once a client is registered in WCM, the expectation is that they are enrolled in relevant programs (at a minimum VCC or ICC depending on need) within an appropriate timeframe (30 day target)
- The start and end dates / program duration is monitored as a measure of **expedited service delivery**
  - Length of service / time in programs is also important – ensure dates are accurate and program enrollments are exited in a timely manner once the client leaves that program

CLIENT IS NOW  
ENROLLED IN  
RELEVANT PROGRAM

CREATING A CARE  
PLAN IS NEXT...

## STRUCTURE OF CARE PLAN



**Goals** are the overarching area of need we're working on with the client

**Activities / Actions** are the steps taken to meet that need

- Each action must be attributed to a goal
- We have predesigned goals and actions for CPP
- Closing out is required for each action (progress updates are optional), before a client is exited from VCC or ICC programs and deactivated from CPP

PREDESIGNED  
GOALS AND  
ACTIONS FOR  
CPP

Goals	Activities / Actions
<b>Behavioral Health</b>	Referral for behavioral health screening and assessment
	Support client engagement in accessing behavioral health treatment
	Linkage to behavioral health outreach
	Linkage to Behavioral health services / treatment provider
<b>Benefits and Supportive Services</b>	Support client to maximize eligible income
	Referral for Social Services benefits eligibility assessment
	Support client to manage and maintain budget
	Support client to reduce debts / arrears, establish payment plans
<b>Correctional Health</b>	Referral to substance use, co-occurring disorder screening and assessment
	Linkage to substance use, co-occurring disorder services / treatment provider
	Support client to prevent self-harm or suicide
	Support client engagement in substance use, co-occurring disorder treatment
	Plan and support clients reentry, including treatment access, from custodial setting
<b>Healthcare</b>	Referral to healthcare screening and assessment
	Linkage to healthcare services / treatment provider
	Support client to better manage chronic health conditions
	Support client in obtaining diagnosis and treatment planning
	Plan and support client discharge from healthcare setting
<b>Housing</b>	Complete Coordinated Entry System (CES) status check
	Linkage to street outreach
	Referral to Shelter, coordinate housing placement
	Linkage to housing services / provider and housing navigation
	Linkage to Emergency Rental Assistance / Program
<b>Probation</b>	Support client to comply with community corrections requirements
	Plan and support clients reentry from custodial setting
	Support client to manage and reduce risks

# CREATING A CARE PLAN: SELECT 'PLAN' FROM THE CLIENT'S SUMMARY PAGE

The screenshot displays the IBM Watson Care Manager web application interface. The browser address bar shows the URL: <https://care-manager02.us-south.wh-wcm.watson-health.ibm.com/wcm/mtinit/7392532/02>. The user is logged in as Hi Melanie.

The main content area is titled "Summary" for client "Anna Joe". The client's profile information is visible on the left sidebar:

- Anna Joe**
- 51 Years
- 4/1/1970
- Male
- Priority: Not Set
- Alerts (6)
- Virtual Record
- Address:** 230 Cookie St, Santa Ana, California, 98192
- Phone:** 101-230-1114

The "Plan" dropdown menu is open, showing the following options:

- Plan
- Goals
- Client Actions
- Care Team Actions
- Services
- Barriers
- Community Resources
- Inquiries

The main summary page contains several sections:

- Coordinated Housing Placement:** ICC - Intense Care Coordination, Custody and Re-Entry
- Latest Note:** Alert
- Actions:** No Records
- Assessments:** No Records
- Conditions:** No Records
- Social Background:** No Records
- Current Medications:** No Records
- Care Team:** Andrew Hong (OCC - ADA Specialist), Gina Ramirez (PROB - Deputy Probation Officer), January Johnson (OCHA - Administrative Manager I - Section Chief), Kathleen Green (PROB - Supervising Probation Officer), Marco Rodriguez (OCCS - Administrative Manager I)
- Latest Touchpoint:** Phone: Unsuccessful

The Windows taskbar at the bottom shows the system time as 9:34 AM on 6/24/2021, with a temperature of 65°F.

# OPENS THE CLIENTS CARE PLAN PAGE

The screenshot shows a web browser window with the URL <https://care-manager02.us-south.wh-wcm.watson-health.ibm.com/wcm/mtinit/7392532/02>. The application is IBM Watson Care Manager, and the user is logged in as Hi Melanie. The main content area displays the care plan for Anna Joe, with the 'Plan' tab selected. The left sidebar shows the client's profile, including name, age, date of birth, gender, priority, alerts, and address. The main content area is divided into two columns. The left column contains a list of sections: Activities (7 items), Goals (6 items), Barriers, and a 'Show completed goals' checkbox. The right column shows a detailed view of the 'Activities' section, which is currently empty, with sub-sections for Services, Actions for Anna, and Care Team Actions, all showing 0 open items.

IBM Watson Care Manager

Summary **Plan** Programs Data History Team

Plan

**Anna Joe**  
51 Years  
4/1/1970  
Male  
Priority: Not Set  
Alerts (6)  
Virtual Record

**Address**  
230 Cookie St  
Santa Ana,  
California, 98192

**Phone**  
101-230-1114

Activities 7 +

Goals 6 +  
Follow up on identified initial needs  
 Show completed goals

Barriers +

Activities

- Services 0 open
- Actions for Anna 0 open
- Care Team Actions 0 open

Type here to search

9:38 AM  
6/24/2021

# ADD RELEVANT GOALS TO CARE PLAN

IBM Watson Care Manager

Summary Plan Programs Data History Team

To add predesigned goals, click the lightbulb next to 'goals'

Activities 7 +

Goals 6 +

Suggested Goals

- Behavioral Health +
- Benefits and Supportive Services +
- Correctional Health +
- Healthcare +
- Housing +
- Probation +

Then select + to add the relevant goal

Anna Joe  
51 Years  
4/1/1970  
Male  
Priority: Not Set  
Alerts (6)  
Virtual Record  
Address  
230 Cookie St  
Santa Ana,  
California, 98192  
Phone  
101-230-1114

9:42 AM  
6/24/2021

CLICK SAVE TO ADD THE GOAL TO THE CLIENTS CARE PLAN

The screenshot displays the IBM Watson Care Manager web application. The browser's address bar shows the URL: <https://care-manager02.us-south.wh-wcm.watson-health.ibm.com/wcm/mtinit/7392532/02>. The application header includes the title 'IBM Watson Care Manager' and a user profile for 'Hi Melanie'. The main content area features a navigation menu with options: Summary, Plan, Programs, Data, History, and Team. A modal window titled 'Behavioral Health' is open, containing the following form fields:

- Programs: ICC - Intense Care Coordination
- Source: Watson Care Manager
- Original Source: Watson Care Manager
- Focus Areas: Select option(s)
- Type: (dropdown menu)
- Start Date: 06 / 24 / 2021
- Target Value: (input field)

At the bottom right of the modal, there are two buttons: 'Save' (highlighted with an orange arrow) and 'Cancel'. The left sidebar of the application shows the patient profile for 'Anna Joe', including age (51 Years), date of birth (4/1/1970), gender (Male), and priority (Not Set). It also lists alerts (6), a virtual record, and the patient's address and phone number.



# THE GOAL IS NOW VISIBLE ON THE CLIENT CARE PLAN PAGE

The screenshot displays the IBM Watson Care Manager interface for a client named Anna Joe. The interface is divided into several sections:

- Header:** Shows the application name "IBM Watson Care Manager" and the user's name "Hi Melanie".
- Navigation:** Includes tabs for "Summary", "Plan" (selected), "Programs", "Data", "History", and "Team".
- Client Profile (Left Sidebar):**
  - Anna Joe**: 51 Years, 4/1/1970, Male, Priority: Not Set.
  - Alerts (6)**: Indicated by a red exclamation mark icon.
  - Virtual Record**: Indicated by a document icon.
  - Address**: 230 Cookie St, Santa Ana, California, 98192.
  - Phone**: 101-230-1114.
- Plan Section (Main Content):**
  - Activities**: 12 items, with a plus sign to add more.
  - Goals**: 5 items, with a plus sign to add more. A sub-item "Follow up on identified initial needs" is visible.
  - Behavioral Health**: Highlighted with an orange arrow pointing to it.
  - Show completed goals**: A checkbox option.
  - Barriers**: 1 item, with a plus sign to add more.
- Right Panel (Plan Details):**
  - Services**: 0 open.
  - Actions for Anna**: 0 open.
  - Care Team Actions**: 0 open.

The Windows taskbar at the bottom shows the search bar, system tray with weather (65°F), and the date/time (9:49 AM, 6/24/2021).

# NEXT, ADD ACTIVITIES (ACTIONS) TO THE CLIENTS CARE PLAN

IBM Watson Care Manager

Summary **Plan** Programs Data History Team

Plan

Activities 12 +

Activities

Suggested Activities

- Street outreach

Client Actions

- Attend any Health care/Mental care appoint...
- Report to your probation officer
- Follow up with community programs in whic...
- Linkage to behavioral health outreach
- Linkage to Behavioral health services / treat...
- Referral for behavioral health screening and ...
- Support client engagement in accessing beh...

Care Team Actions

es 0 open

s for Anna 0 open

eam Actions 0 open

Again, the predesigned actions can be found under the 'activities' lightbulb

Then click + to add the relevant action

9:54 AM 6/24/2021

# YOU CAN ASSIGN THE ACTION TO A CARE TEAM MEMBER AND ADD TIMEFRAME FOR COMPLETION IF REQUIRED

Referral for behavioral health screening and assessment

Assign To: Melanie McQueen

Assign To Role: [Dropdown]

Start Date \*: 06 / 24 / 2021

Expected End Date: mm / dd / yyyy

Category: [Dropdown]

Associate Goals \*: Behavioral Health

Reason: [Text Area]

Save Cancel

*The action will automatically be associated to the relevant goal*

**Anna Joe**  
51 Years  
4/1/1970  
Male  
Priority: Not Set  
Alerts (6)  
Virtual Record

Address  
230 Cookie St  
Santa Ana,  
California, 98192

Phone  
101-230-1114

Windows Taskbar: Type here to search, 65°F, 9:57 AM 6/24/2021

# THE ACTION NOW APPEARS ON THE CLIENTS CARE PLAN PAGE

The screenshot displays the IBM Watson Care Manager interface for a client named Anna Joe. The left sidebar contains the client's profile information, including name, age, date of birth, gender, priority, alerts, virtual record, and address. The main content area is divided into sections for Activities, Goals, Behavioral Health, Barriers, and a detailed view of the Plan. The Plan section shows a table of activities, with one activity highlighted: 'Referral for behavioral health screening and assessment' assigned to Melanie McQueen, with a status of 'Ongoing'. An orange arrow points to this activity.

**Client Profile:**

- Anna Joe**
- 51 Years
- 4/1/1970
- Male
- Priority: Not Set
- Alerts (6)
- Virtual Record
- Address: 230 Cookie St, Santa Ana, California, 98192
- Phone: 101-230-1114

**Plan Section:**

- Activities: 11
- Goals: 5
- Behavioral Health: 1
- Barriers: 0

**Activities Table:**

Name	Assigned To	Status	Progress
Referral for behavioral health screening and assessment	Melanie McQueen	Ongoing	○○○○○

# ANY TIMEFRAMES ASSIGNED TO THE ACTION, WILL APPEAR ON THE ASSIGNED CARE TEAM MEMBERS WCM HOME PAGE

The screenshot displays the IBM Watson Care Manager interface. The browser address bar shows the URL: <https://care-manager02.us-south.wh-wcm.watson-health.ibm.com/wcm/mtinit/7392532/02>. The page title is "Home".

**Calendar View:** The calendar is set for Thursday, June 24, 2021. It shows a "Day" view with a timeline from 1:00 PM to 4:00 PM. A red dot is visible on the timeline at approximately 1:30 PM. The left sidebar lists "Due Tasks 0 of 0" and "Due Actions 0 of 0". An orange arrow points to the "Due Actions" section with the text: "All actions due can be viewed here".

**Work List View:** The work list on the right includes sections for "Alerts 3 of 3", "Today's Clients 0 of 0", "Overdue Tasks 0 of 0", "Overdue Actions 1 of 1", "Unscheduled 1 of 1", and "My Referrals 0 of 0". The "Overdue Actions" section is expanded, showing a task: "Complete Coordinated Entry System" by "Anna Joe". An orange arrow points to this task with the text: "'Overdue' or 'unscheduled' actions can be viewed here".

The Windows taskbar at the bottom shows the search bar, task view, and various application icons. The system tray displays the temperature (67°F) and the date/time (10:28 AM, 6/24/2021).

# FROM THE CLIENTS CARE PLAN PAGE, THE STATUS OF ACTIONS CAN NOW BE UPDATED

The screenshot displays the IBM Watson Care Manager interface for a client named Anna Joe. The page is titled "Plan" and shows various sections including Activities, Goals, Behavioral Health, and Barriers. A context menu is open over the "Referral for behavioral health screening and assessment" action, listing options: Assign, Edit, Add Progress, Add Goals, Add Barriers, Complete (highlighted), Update Completion Details, and Delete. An orange arrow points to the "Complete" option.

**Client Information:**  
Anna Joe  
51 Years  
4/1/1970  
Male  
Priority: Not Set  
Alerts (6)  
Virtual Record

**Address:**  
230 Cookie St  
Santa Ana, California, 98192

**Phone:**  
101-230-1114

**Plan Summary:**  
Activities: 11  
Goals: 5  
Behavioral Health: 1  
Barriers: 0

**Activities Table:**

Name	Assigned To	Status
Referral for behavioral health screening and assessment	Melanie McQueen	Ongoing

Showing 1 of 1 [Show Open](#)

Actions can be edited, progress updated, completed (or deleted if added in error)

# WHEN COMPLETING ACTIONS, PLEASE PROVIDE OUTCOME

My Apps | IBM Watson Care Manager | <https://care-manager02.us-south.wh-wcm.watson-health.ibm.com/wcm/mtinit/7392532/02>

IBM Watson Care Manager | Hi Melanie

Summary | Plan | Programs | Data | History | Team

### Complete Action

\* required field

Care Team Action: Referral for behavioral health screening and assessment

Outcome \*  
Date \*  
Comments

- Successful
- Not Successful
- Abandoned
- Disenrolled from program
- Completed program
- Did not enroll in program


Save Cancel

**Anna Joe**  
51 Years  
4/1/1970  
Male  
Priority: Not Set  
Alerts (6)  
Virtual Record

Address  
230 Cookie St  
Santa Ana,  
California, 98192

Phone  
101-230-1114

Windows Taskbar: Type here to search | 66°F | 10:11 AM 6/24/2021



## A NOTE ON COMPLETING ACTIONS

- Select either **‘successful’** or **‘not successful’** as default (these measures are used in CPP performance reporting)
- Only use the other categories if the action is no longer relevant or if progress was never even attempted
- Closing out is required for each action (progress updates are optional), before a client is exited from WCM programs and deactivated from CPP



# COMPLETED ACTIONS ARE VISIBLE ON THE CLIENTS CARE PLAN PAGE

The screenshot displays the IBM Watson Care Manager interface for a client named Anna Joe. The page is titled "Plan" and shows a list of activities and goals. A yellow arrow points to the "Referral to BHS for screening and assessment" activity, which is marked as completed with a checkmark. The interface includes a sidebar with client information, a top navigation bar, and a main content area with tabs for Summary, Plan, Programs, Data, History, and Team. The Windows taskbar is visible at the bottom, showing the time as 10:23 AM on 6/24/2021.

**Client Information:**

- Anna Joe**
- 51 Years
- 4/1/1970
- Male
- Priority: Not Set
- Alerts (6)
- Virtual Record
- Address: 230 Cookie St, Santa Ana, California, 98192
- Phone: 101-230-1114

**Plan Page Content:**

- Activities:** 12 (+)
- Goals:** 5 (+)
- Follow up on identified initial needs
- Behavioral Health
- ✓ Referral to BHS for screening and assessment
- ✓ Complete Client Authorization Form
- ☑ Show completed goals
- Barriers:** (+)

**Plan Page Summary:**

- Services:** 0 open
- Actions for Anna:** 0 open
- Care Team Actions:** 0 open

WHEN ALL CARE PLAN  
ACTIONS HAVE BEEN  
CLOSED OUT, AND

THE CLIENT NO LONGER  
NEEDS VCC / ICC,

AN OUTCOMES FORM  
CAN BE COMPLETED, AND

THEY CAN BE EXITED  
FROM THAT PROGRAM...



NOTES ON  
EXITING  
CLIENTS  
FROM  
PROGRAMS

Once a client leaves a program they are enrolled in, they must be exited –

- An **outcomes form** must be completed first for the VCC or ICC programs
  - this measures clients' outcomes and overall CPP impact
- **Program exit** captures if **successful (completed)** or **unsuccessful (disenrolled)**
  - These successful and unsuccessful program exits are monitored by the Care Plus Program to determine **effectiveness**

*All program **actions** in the clients **care plan** must be completed / closed out before exiting the program*

# TO ACCESS THE OUTCOMES FORM, SELECT THE RELEVANT ICC OR VCC PROGRAM FROM THE 'PROGRAMS' TAB

The screenshot displays the IBM Watson Care Manager interface for patient Anna Joe. The 'Programs' tab is selected, showing a list of programs. An orange arrow points to the 'ICC - Intense Care Coordination' program.

Name	Status	Updated By
Coordinated Housing Placement	Assigned on 2/26/2021 3:32 PM	Natalie Dempster
ICC - Intense Care Coordination	Enrolled on 6/2/2021 1:26 PM	Melanie McQueen
Custody and Re-Entry	Enrolled on 12/2/2020 1:53 PM	Krithika Sudeswaran
Custody and Re-Entry	Disenrolled on 12/2/2020 12:33 PM	Krithika Sudeswaran
Custody and Re-Entry	Disenrolled on 12/2/2020 9:52 AM	Krithika Sudeswaran
Custody and Re-Entry	Disenrolled on 12/1/2020 11:20 PM	Krithika Sudeswaran

**Anna Joe**  
51 Years  
4/1/1970  
Male  
Priority: Not Set  
Alerts (6)  
Virtual Record

**Address**  
230 Cookie St  
Santa Ana,  
California, 98192

**Phone**  
101-230-1114

11:39 AM  
6/2/2021

# SELECT 'OUTCOME MEASUREMENT' UNDER CASE MANAGEMENT

The screenshot displays the IBM Watson Care Manager web application. The browser address bar shows the URL: <https://care-manager02.us-south.wh-wcm.watson-health.ibm.com/wcm/mtinit/7392532/02>. The user is logged in as 'Hi Melanie'. The main navigation bar includes 'Summary', 'Plan', 'Programs', 'Data', 'History', and 'Team'. The client profile for 'Anna Joe' is visible on the left, with details: 51 Years, 4/1/1970, Male, Priority: Not Set, Alerts (6), and Virtual Record. The main content area shows the 'Case Management' section for 'ICC - Intense Care Coordination'. Under 'Case Management', there is a sub-section for 'Outcome Measurement' (0 of 1), which is highlighted with a large orange arrow. The 'Outcome Measurement' section includes a 'Housing:' section with 'SOCDIS Outcomes:' and a list of options: 'Successfully placed in accommodation:', 'Received support to prevent homelessness:', and 'Improved housing situation:'. A red asterisk indicates a 'Required Field'.

IBM Watson Care Manager

Summary Plan Programs Data History Team

Back ICC - Intense Care Coordination

Case Management 0 of 1 Outcome Measurement Repeat Details Download

Outcome Measurement \* Required Field

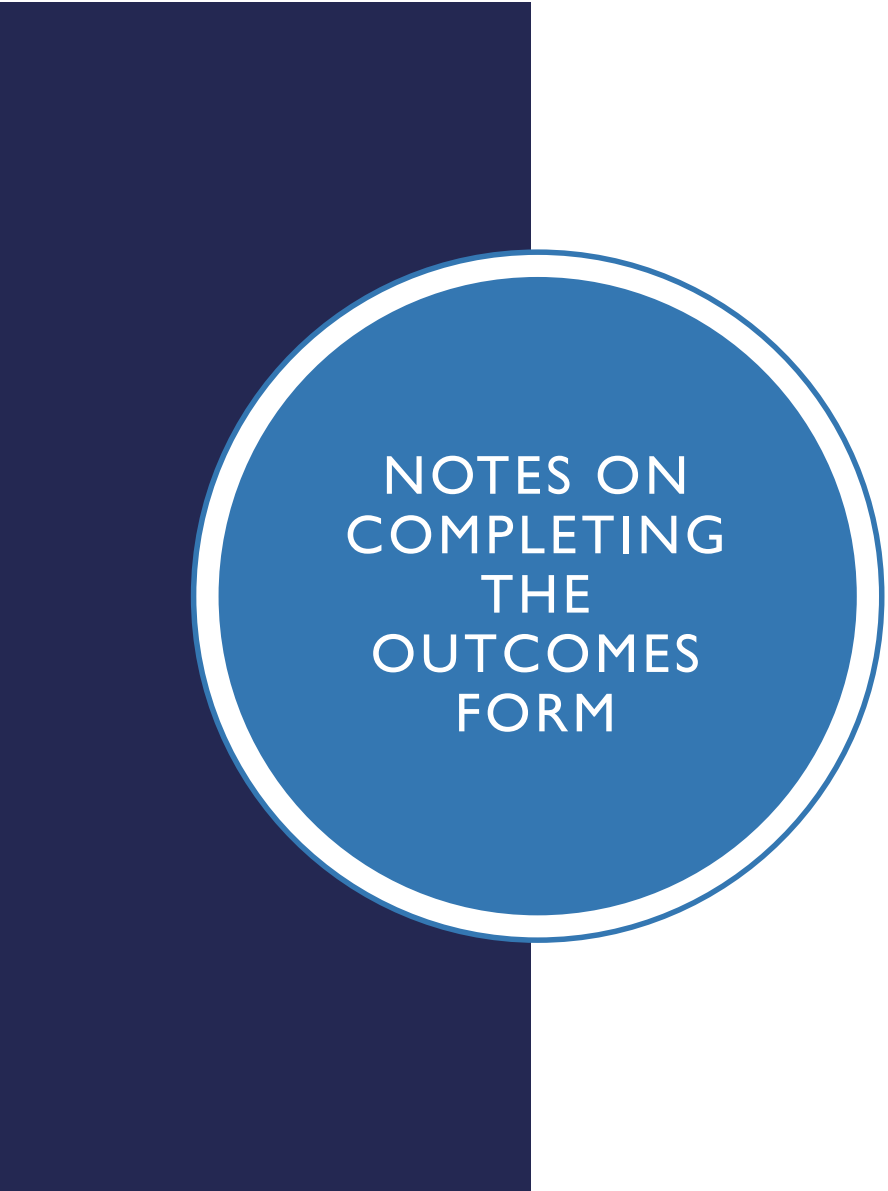
Housing:

**SOCDIS Outcomes:**  
If the client had this need, was it a successful outcome? • Yes – the client had this need and achieved a successful outcome. • No – the client had this need but it was a negative outcome. • Not applicable – the client did not have this need.

Successfully placed in accommodation:  
Received support to prevent homelessness:  
Improved housing situation:

Anna Joe  
51 Years  
4/1/1970  
Male  
Priority: Not Set  
Alerts (6)  
Virtual Record  
Address  
230 Cookie St  
Santa Ana,  
California, 98192  
Phone  
101-230-1114

11:42 AM  
6/2/2021



NOTES ON  
COMPLETING  
THE  
OUTCOMES  
FORM

- The outcomes form is structured under the goal headings:
  - Behavioral health
  - Benefits and Supportive services
  - Correctional health
  - Healthcare
  - Housing
  - Probation
- There are 23 outcome indicators altogether
- Please answer in your professional judgement:
  - ‘Yes’ – if the client had this need and it was a successful outcome
  - ‘No’ – if the client had this need but it was a negative outcome
  - ‘Not applicable’ – the client did not have this need

# WORK THROUGH THE OUTCOMES FORM

My Apps | IBM Watson Care Manager | https://care-manager02.us-south.wh-wcm.watson-health.ibm.com/wcm/mtinit/7392532/02

IBM Watson Care Manager | Hi Melanie

Summary | Plan | Programs | Data | History | Team

Back | ICC - Intense Care Coordination

Case Management 0 of 1 | Outcome Measurement | Repeat | Details | Download

Outcome Measurement

Successfully placed in accommodation: Yes

Received support to prevent homelessness: Yes

Improved housing situation: Yes

Sustained housing / eviction avoided: N/A

Supported to remain at home: N/A

Supported to develop independent living skills:

Each outcome indicator requires a response of 'yes', 'no' or 'N/A'

The response should be reflective of care plan actions

11:45 AM 6/2/2021

# SAVE AND COMPLETE THE OUTCOMES FORM

IBM Watson Care Manager

Summary Plan Programs Data History Team

Back ICC - Intense Care Coordination

Case Management 0 of 1 Outcome Measurement

Outcome Measurement

N/A

Probation

Provided support to comply with probation requirements: \*

N/A

Support to reduce/manage risk factors: \*

N/A

Accessed housing upon release from jail: \*

Yes

Correctional Health

Improved management of chronic conditions: \*

N/A


Access to behavioral health support / treatment while incarcerated: \*

Yes

Supported to cease/reduce/minimize risk from self-harm and suicide: \*

N/A

Complete Save





# NEXT EXIT THE CLIENT FROM THE PROGRAM

**REMEMBER! ENSURE ALL ACTIONS ARE CLOSED OUT IN THE CLIENTS CARE PLAN FIRST**

The screenshot displays the IBM Watson Care Manager interface for a client named Anna Joe. The interface is divided into several sections:

- Client Profile (Left Sidebar):** Anna Joe, 51 Years, 4/1/1970, Male, Priority: Not Set. Alerts (6) and Virtual Record are also visible.
- Plan Overview (Top):** Summary, Plan (selected), Programs, Data, History, Team.
- Plan Details (Main Content):**
  - Referral to BHS for screening and assessment:** Progress: 0/5, Programs: ICC - Intense Care Coordination.
  - Services:** 0 open
  - Actions for Anna:** 0 open
  - Care Team Actions:** 0 open (highlighted with a yellow box and an orange arrow pointing up).
- Left Sidebar (Action List):**
  - Activities: 7
  - Goals: 6
  - Follow up on identified initial needs
  - Referral to BHS for screening and assessment (checked)
  - Complete Client Authorization Form (checked)
  - Show completed goals (checked)
  - Barriers

An orange arrow points from the 'Referral to BHS for screening and assessment' action in the left sidebar to the 'Care Team Actions' section in the main plan view, which shows '0 open' items.

# WHEN THE CLIENT EXITS THE PROGRAM, CLICK 'UPDATE STATUS'

The screenshot displays the IBM Watson Care Manager interface for a client named Anna Joe. The interface includes a navigation menu on the left with sections for Alerts (6), Virtual Record, and Actions. The main content area shows a table of programs with columns for Name, Status, and Updated By. A dropdown menu is open for the 'ICC - Intense Care Coordination' program, showing options for 'Update Status' and 'Edit'. An orange arrow points to the 'Update Status' option.

Name	Status	Updated By
Coordinated Housing Placement	Assigned on 2/26/2021 3:32 PM	Natalie Dempster
ICC - Intense Care Coordination	Enrolled on 6/2/2021 1:26 PM	Melanie McQueen
Custody and Re-Entry	Enrolled on 12/2/2020 1:53 PM	Krithika Sudeswaran
Custody and Re-Entry	Disenrolled on 12/2/2020 12:33 PM	Krithika Sudeswaran
Custody and Re-Entry	Disenrolled on 12/2/2020 9:52 AM	Krithika Sudeswaran
Custody and Re-Entry	Disenrolled on 12/1/2020 11:20 PM	Krithika Sudeswaran

Client Information:  
**Anna Joe**  
51 Years  
4/1/1970  
Male  
Priority: Not Set  
Alerts (6)  
Virtual Record

Address:  
230 Cookie St  
Santa Ana,  
California, 98192

Phone:  
101-230-1114

SELECT 'COMPLETED' IF SUCCESSFUL OR 'DISENROLLED' IF UNSUCCESSFUL

The screenshot displays the IBM Watson Care Manager web application. A modal window titled "Update ICC - Intense Care Coordination Status" is open, showing the current status as "Enrolled". The "New Status" dropdown menu is open, with "Completed" and "Disenrolled" as options. The "Date" field is also open, showing a clock icon. The "Comments" field is empty. The "Save" and "Cancel" buttons are visible at the bottom right of the modal. The background shows the user profile for Anna Joe, with details such as 51 years old, born 4/1/1970, male, and priority not set. The address is 230 Cookie St, Santa Ana, California, 98192, and the phone number is 101-230-1114. The system time is 11:06 AM on 6/2/2021.

My Apps | IBM Watson Care Manager | <https://care-manager02.us-south.wh-wcm.watson-health.ibm.com/wcm/mtinit/7392532/02>

IBM Watson Care Manager | Hi Melanie

Summary | Plan | Programs | Data | History | Team

### Update ICC - Intense Care Coordination Status

\* required field

Current Status: Enrolled

New Status \*  
Completed  
Disenrolled

Date \*  
[Clock icon]


Graduated

Comments

Save | Cancel

Anna Joe  
51 Years  
4/1/1970  
Male  
Priority: Not Set  
Alerts (6)  
Virtual Record  
Address: 230 Cookie St, Santa Ana, California, 98192  
Phone: 101-230-1114

11:06 AM 6/2/2021



CLOSING  
OUT CLIENT  
FROM CARE  
PLUS  
PROGRAM

After:

- ✓ An outcomes form has been completed,
- ✓ The client has been exited from all WCM Programs, and
- ✓ The client no longer needs care coordination under the Care Plus Program,

They can be closed out from the Care Plus Program by **deactivating** them

*(the client can always be reactivated if they return to CPP)*

# TO CLOSE OUT THE CLIENT FROM CPP, CLICK 'DEACTIVATE' FROM ACTIONS MENU FROM THE CLIENT'S PAGE

The screenshot displays the IBM Watson Care Manager interface. On the left, a dark blue sidebar contains a menu with the following items: New Task, New Note, New Touchpoint, New Alert, New Referral, Update Photo, Update Priority, Activate, Deactivate (highlighted in blue), and Actions. An orange arrow points to the 'Deactivate' option. Below the menu, the client's address and phone number are listed: 230 Cookie St, Santa Ana, California, 98192 and 101-230-1114. The main content area is titled 'Summary' and includes tabs for Plan, Programs, Data, History, and Team. The Summary view shows several sections: Goals (Follow up on identified initial needs), Programs (Coordinated Housing Placement, ICC - Intense Care Coordination, Custody and Re-Entry), Latest Note (Alert), Actions (No Records), Assessments (No Records), Conditions (No Records), Social Background (No Records), Current Medications, Care Team (Andrew Hong, Gina Ramirez, January Johnson, Kathleen Green, Marco Rodriguez), and Latest Touchpoint (Phone: Unsuccessful). The top navigation bar shows the user's name as 'Hi Melanie'.

THE CLIENT IS NO  
LONGER ACTIVE IN THE  
CARE PLUS PROGRAM

*(CAN BE REACTIVATED IF THEY  
RETURN TO CPP)*



ANY QUESTIONS?

Thank you!