welkin

V

Care Application

Agenda

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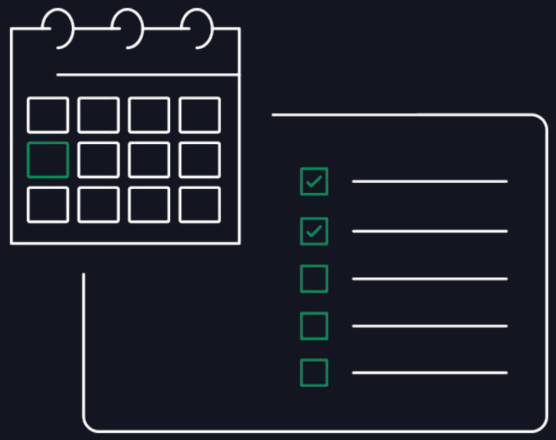

Agenda

- Tasks - Manual Creation
- Encounters
- Encounter View
- Encounter Status
- Encounter Notes
- Encounter Dispositions
- Profiles
- Profiles - Manual Entry
- Unrecognized Communications
- Unrecognized Communications - Assign to Patient

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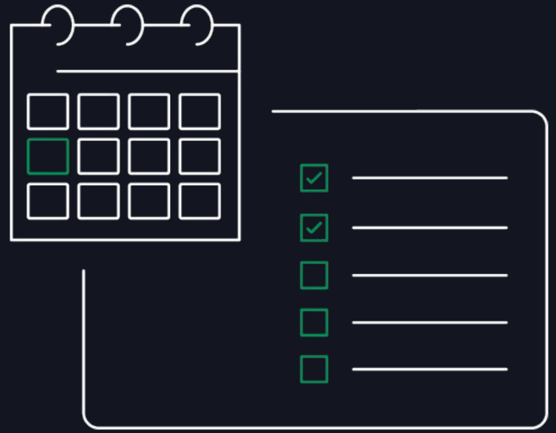


Care Navigation

What is Care?

The Care application is where all front end processes occur and where your organization will perform everyday tasks.

In this training, we will review how to navigate through the Care application and perform some basic tasks.

Prerequisites to logging in

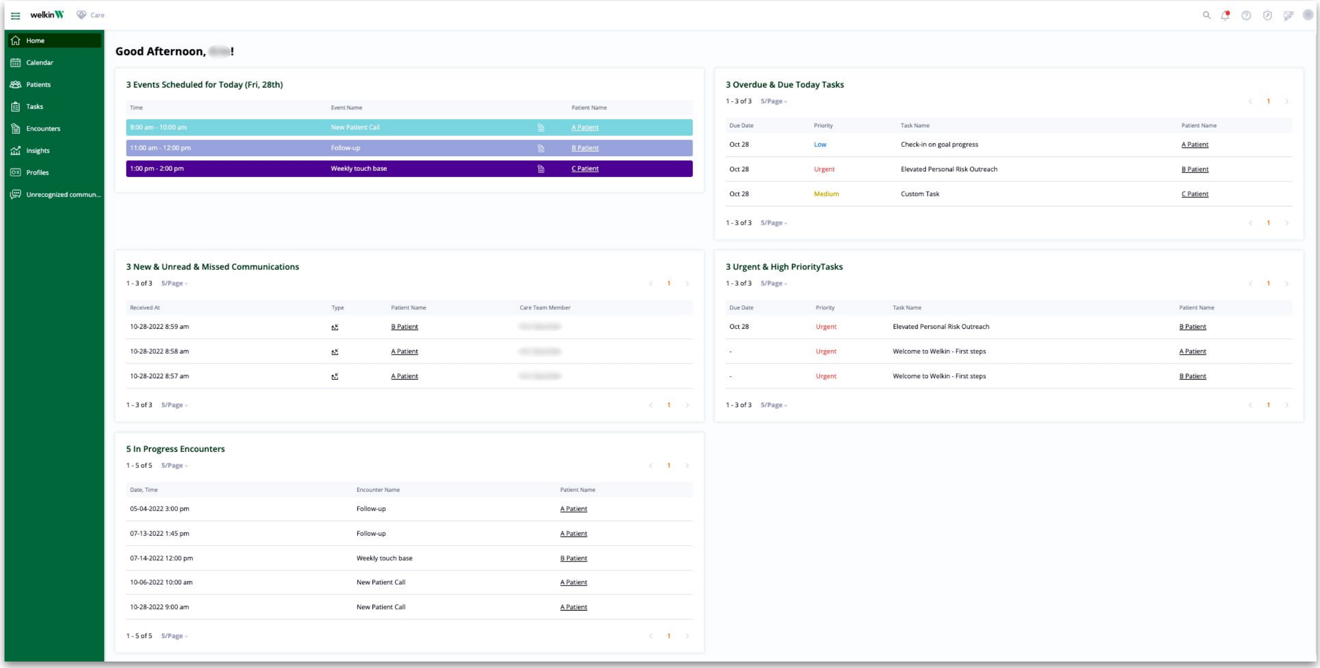
Your organization will configure your user to access certain information in the application, including:

- Roles
- Regions
- Territories
- Security Policies

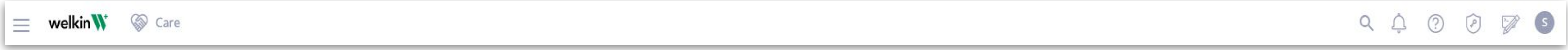
Log in to Care by navigating to https://care.live.welkincloud.io/ enter entering your credentials. Alternatively, you can login via SSO if your organization has configured this functionality.

Home Screen

After entering your username and password you will be directed to the Home Screen. From here you can access all navigation menus in the Care Application.



Horizontal Menu



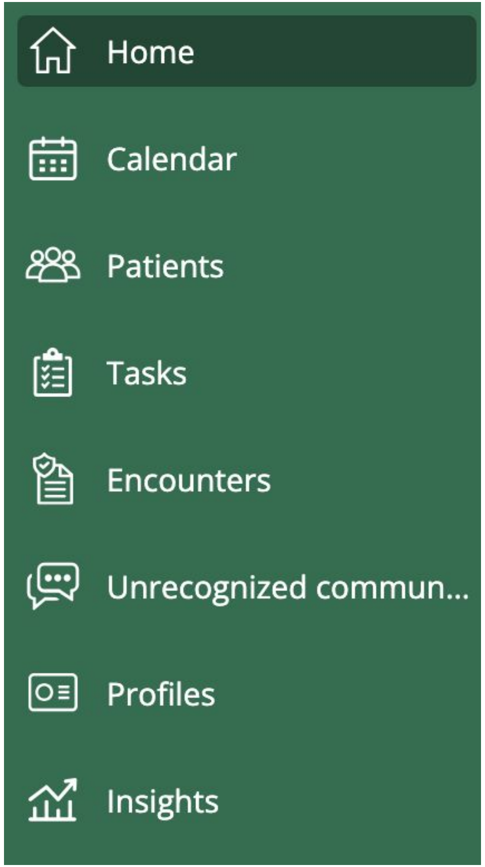
- 3 Horizontal lines - (upper left hand corner of screen)- Collapse/expand the green navigation menu on the left hand side of the screen.
- Magnifying Glass - Search for any patient in the system by email, name, phone and MRN (if in use).
- Bell - Houses notifications and activities in the system. Can be sorted by type. Notifications are configured in Designer, and generate based on being a care team member or primary point of contact for a patient, and automatically generate based on some trigger event.
- Question Mark - Help Center- Surfaces Help information that is configured based on organizational needs.
- Icons - Links to Admin and Designer (visible only if permitted).
- Initials - ‘My Profile’, Change Environment, Change Role, Log Out.

Navigation Menu

Displayed menu items are based on the user's role. Below are all possible items that can appear in the Navigation Panel:

- Home
- Tasks
- Calendar
- Patients
- Relation therapy
- Encounters
- Profiles
- Unrecognized Communications

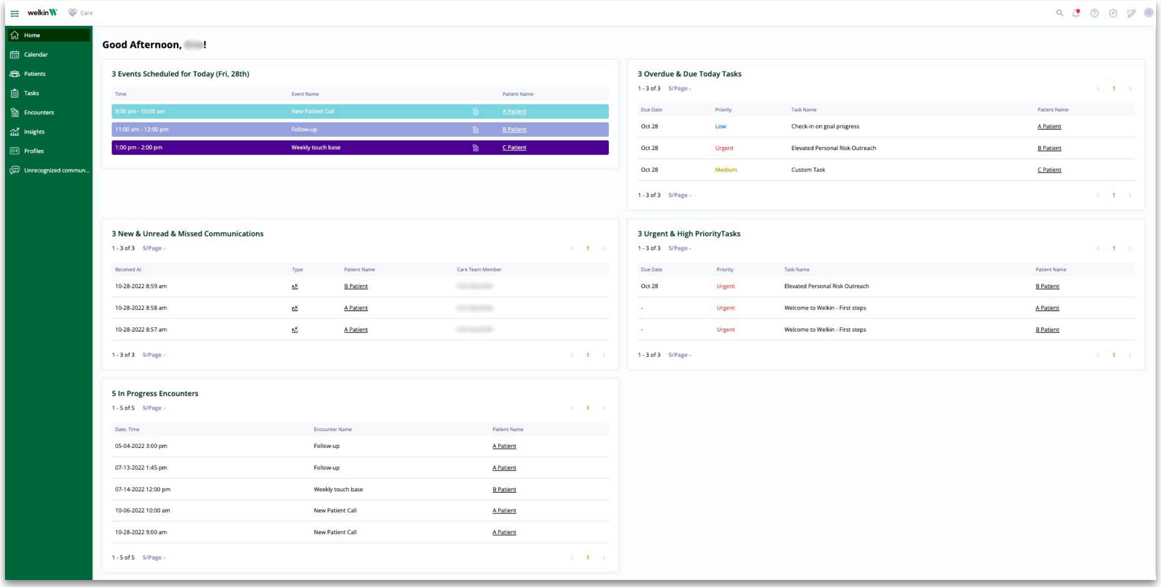
This menu can be minimized by clicking on the three horizontal lines in the upper left hand corner of the top menu. Expand again with an additional click.



Home Screen

The home screen is the first screen when launching into Care. This screen is hard-coded to show the following:

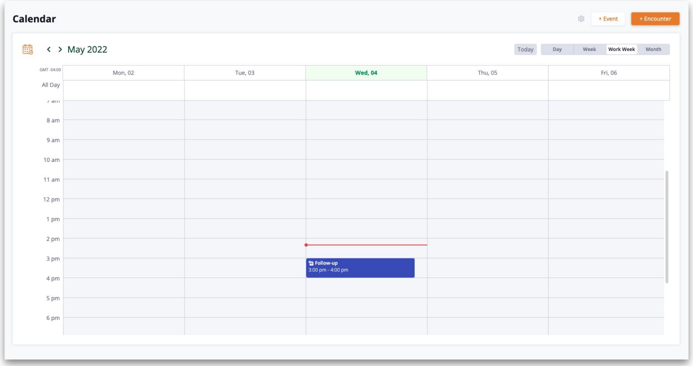
- Events Scheduled for Today
- New Unread & Missed Communications
- In Progress Encounters
- Overdue & Due Today Tasks
- Urgent & High Priority Tasks



If your organization is utilizing the Dr. First integration - another widget will appear on this screen showing prescription/pharmacy tasks.

Calendar - Navigation

- The calendar will show any Events and Encounters for the selected care team member.

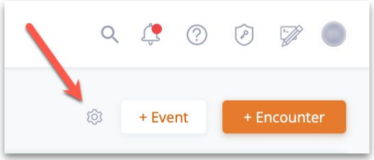


- Clicking on the orange calendar icon will allow you to view and navigate within the calendar and search other user's calendars.

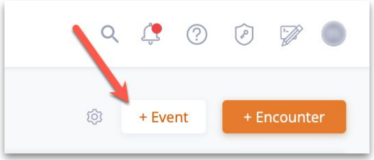
- The calendar view can be modified by clicking on the options in the upper right hand corner.

Calendar - Working Hours, Events, and Encounters

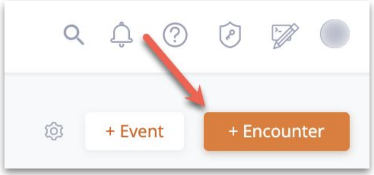
- The gear icon allows the care team member to input their working hours.



- Events can be added by clicking on the +Event icon.



- Encounters can be added manually by clicking on the +Encounter icon.



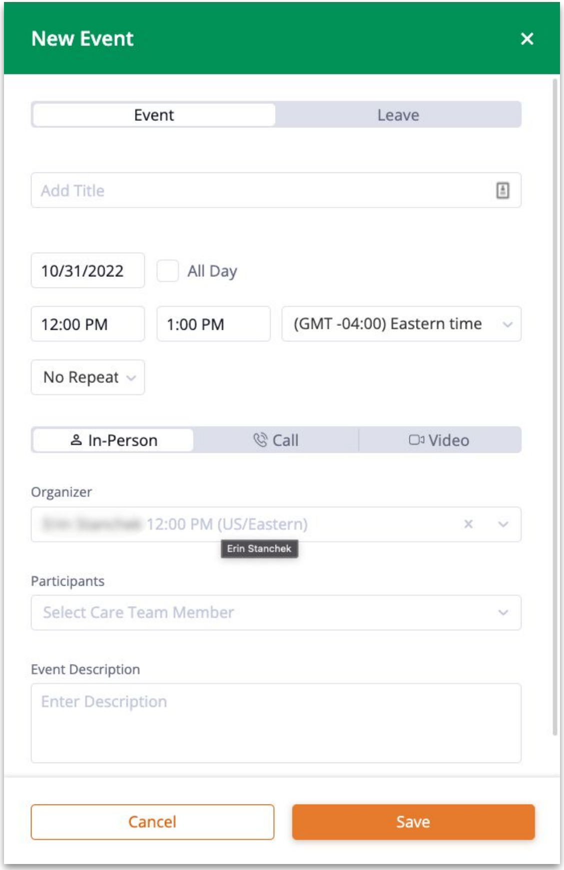
Calendar - Events and Leave

Selecting the "+ Event" button will expand the window and allow you to create an Event.

- *An Event is a block of time unrelated to direct patient care.*

A sidebar will open, allowing the care team member to enter an Event with the relevant information.

Click on the "Leave" button to enter information to indicate when the care team member will be out of the office.

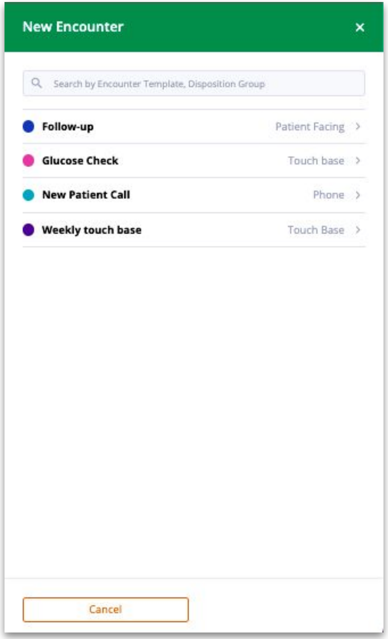


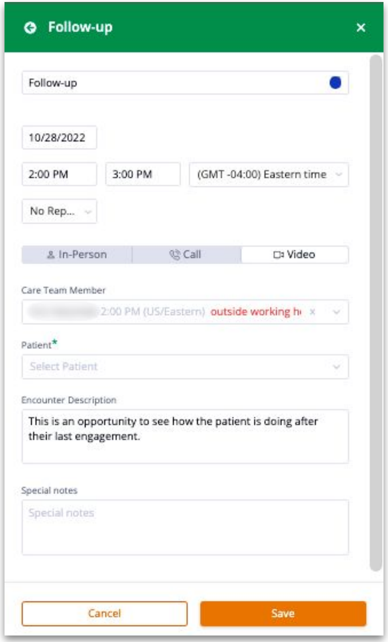
Calendar - Encounters

- Click on the +Encounter icon to enter a new Encounter onto the care team member's calendar.

- A sidebar will open to allow the care team member to select the type of Encounter they would like to schedule.

- Clicking on an Encounter type will allow the user to enter the appointment information.

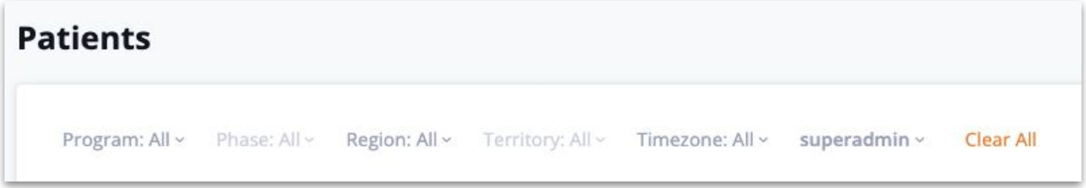




Patients

The logged-in user will, by default, see any patient where they are a member of the care team. Patients can be filtered through horizontal drop downs as indicated below:

- Program
- Phase
- Region
- Territory
- Timezone
- User Permissions

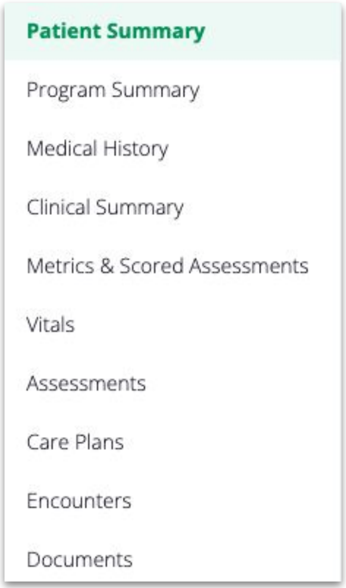


Clicking on the patient will open the selected patient’s information. This information is customizable; the view will be based on role and defined by your organization.

Menu items within the patient profile

- The names and content of the menu items can vary according to how they were configured by your organization.

- For example - in Program Summary, the user will see the summary of a particular pre-defined data set.

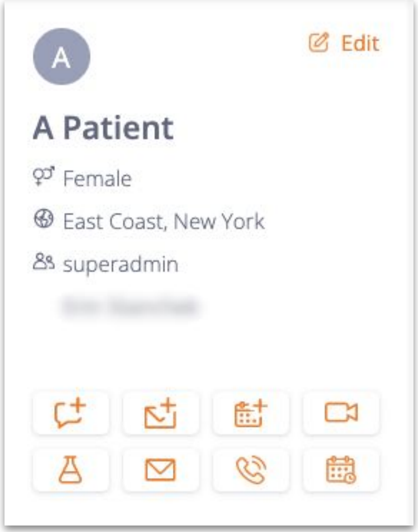


Patient (Top Menu)

Shows demographics of the selected patient such as:

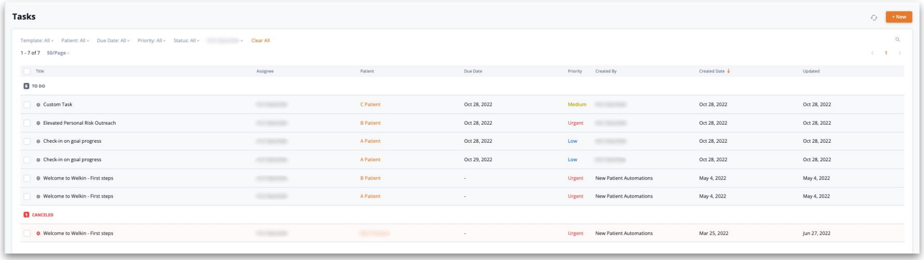
- date of birth
- address
- etc.

Clicking “more info” will expand this column and will show further demographic information.

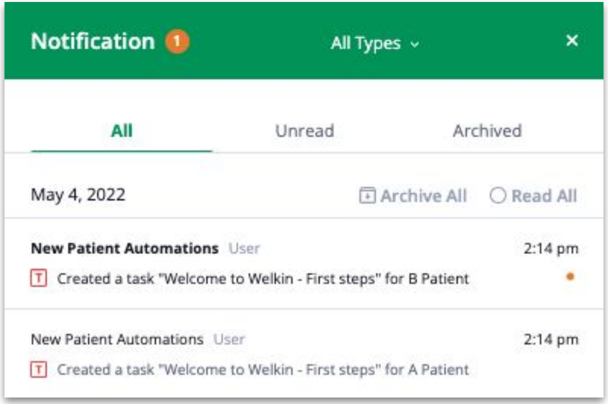


Tasks

- The Task navigation menu contains system tasks created for the user or other members of the care team:
  - Tasks are action items that are assigned to system users.



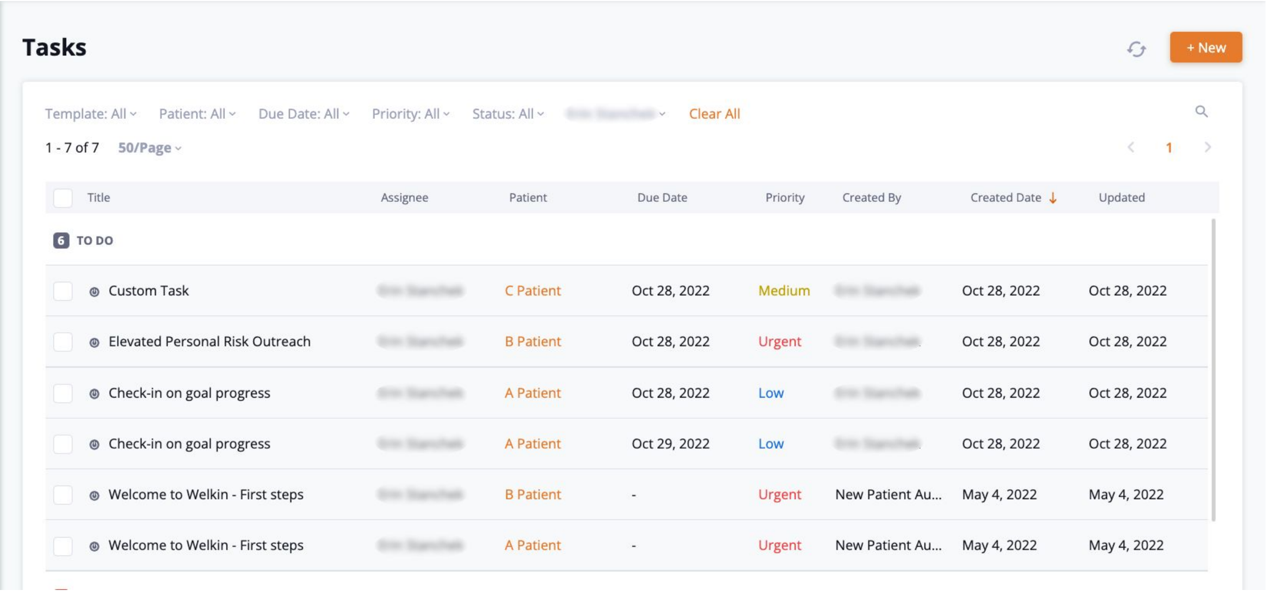
- Tasks are generated through an automatic process; or created manually. Tasks will:
  - Always have an assignee
  - May or may not be associated with a patient
  - Can have a due date set
  - Have a priority level



Tasks - Filtering & Sorting

The status of tasks can be changed at any point in time. When changes are made to a task, notifications will be sent to any watchers of the task. Tasks can be bulk edited. Anyone with access to a task can change, reassign, or take over a task (all changes are available in the audit trail within Admin).

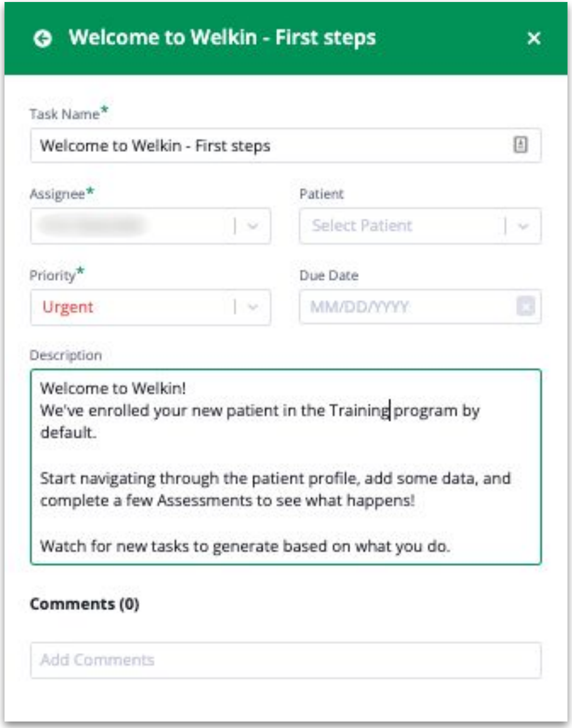
The “I am on it” button will allow the user to assume responsibility for the task, and archive the notification for everyone except the person working on it.



Tasks - Manual Creation

- Navigate to tasks in the green Navigation Panel
- Click on the +New button 

- Select from a predefined task list, or create a custom task by clicking on that option
- Enter the required information for this task
  - Task Name (if this was a custom task)
  - Assignee
  - Priority
- You can also enter the Patient Name, Due Date, and Description

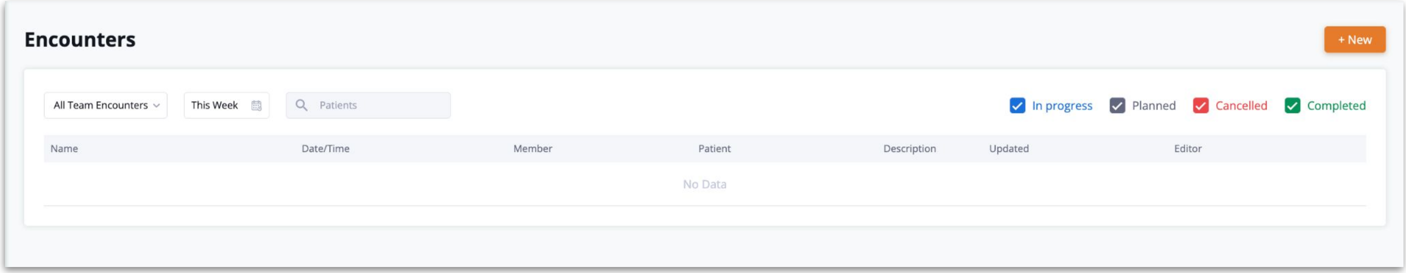


Encounters

Encounters are a pre-defined patient interaction. Encounters can be created manually or by an automation.

A list of Encounters can be seen on the main Encounters screen. This includes:

- Name - The name of the encounter type.
- Date/Time - Date and Time of the Encounter.
- Member - The team member that is scheduled.
- Patient - Patient who is scheduled.
- Description - Description of what takes place during this patient interaction.
- Updated - Date and Time stamp of changes.
- Editor - Last person to make any changes.

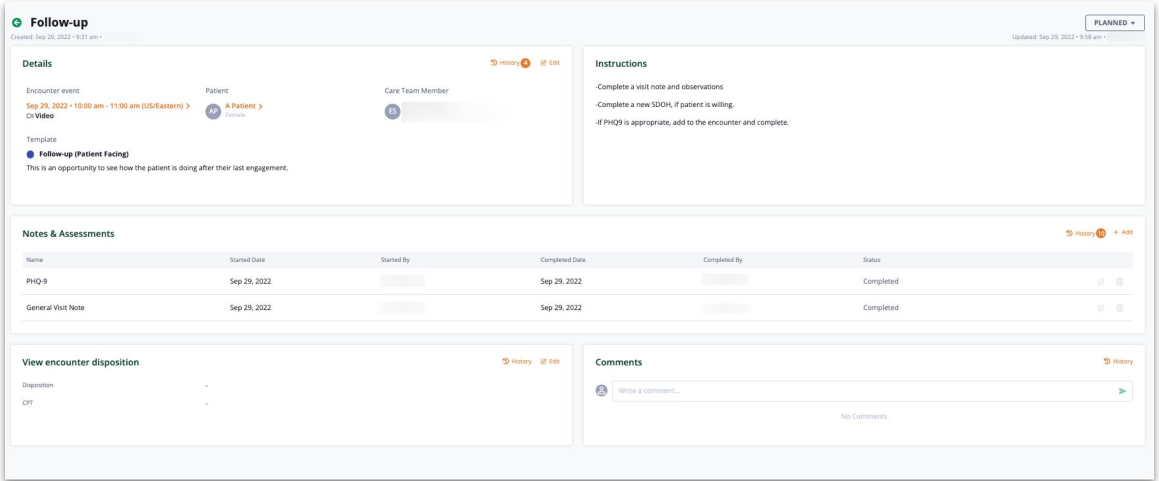


Encounter View

Clicking on the Encounter allows you to view more information and initiate the patient interaction.

The Encounter view shows and allows the care team member to edit:

- Details
- Instructions
- Notes & Assessments
- Encounter Dispositions
- Comments
- Billing & Payment Info (where applicable)

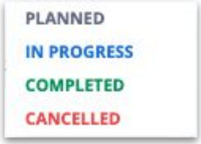


Encounter Status

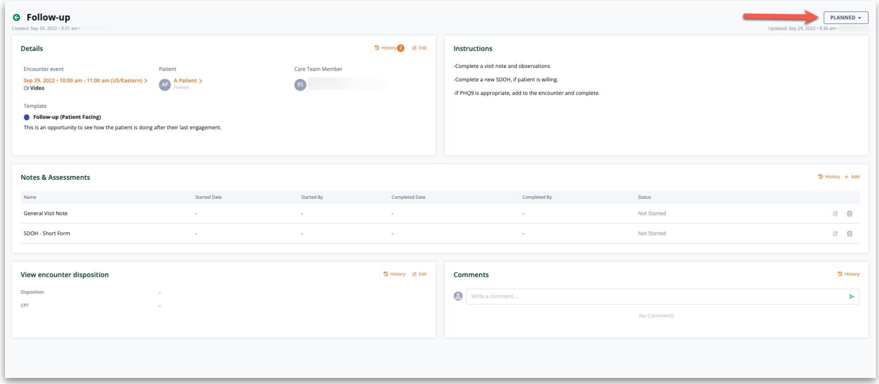
In order to make any changes, Encounter status needs to be moved from Planned to In Progress.

There are four statuses:

- Planned
- In Progress
- Completed
- Canceled



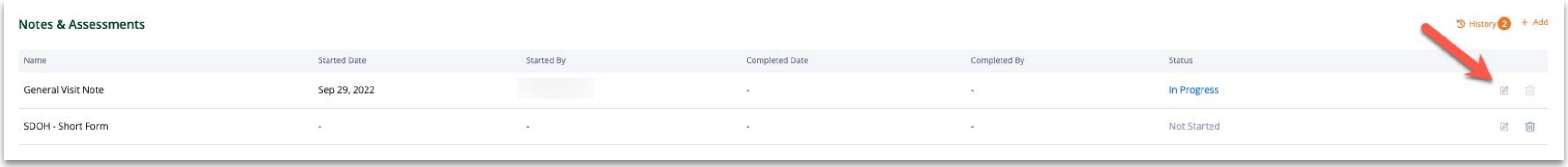
When the care team member finishes all the required fields of this Encounter, they will move the status from In Progress to Complete.



The Cancelled status is utilized as needed for when a patient or provider will not be participating in, or completing the Encounter.

Encounter Notes

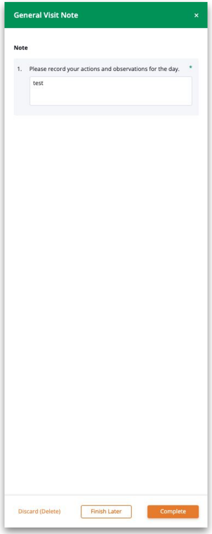
To start recording visit notes or Assessments for this patient, click on the pencil and paper icon of the line item you want to complete.



A drawer will open allowing you to:

- Discard (delete) the data entered.
- Finish Later - leave your note available for editing.
- Complete - finish your notes for this Encounter.

After completing a note, special permissions are required for editing.

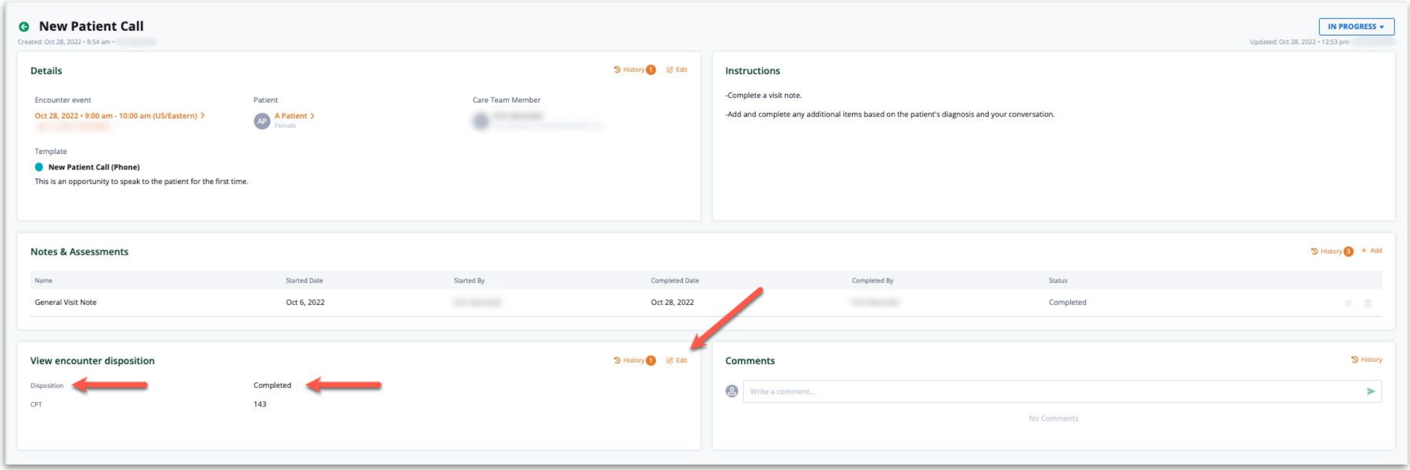


Encounters - Dispositions

A Disposition is an optional data field that can be used to include additional content in an Encounter.

For example, if your provider should enter a CPT code to the Encounter before completion, you can add a Disposition field.

While in the Encounter the provider will click on the edit button in the Disposition field to add this information.

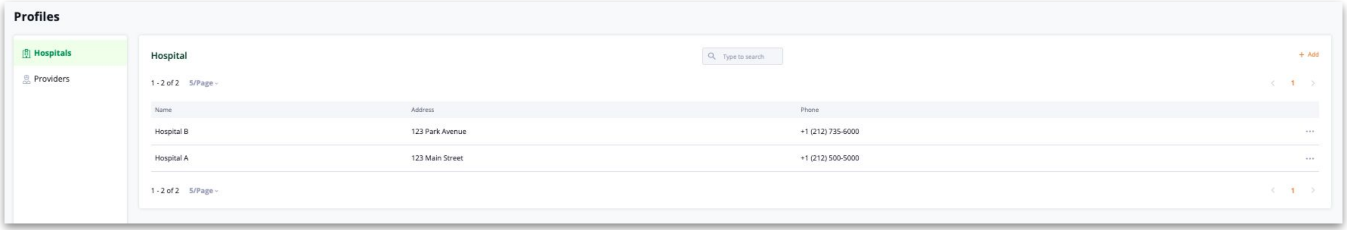


Profiles

Profiles (located in the left hand Navigation Menu of Welkin) are for entities outside your organization that are involved with a patient's care.

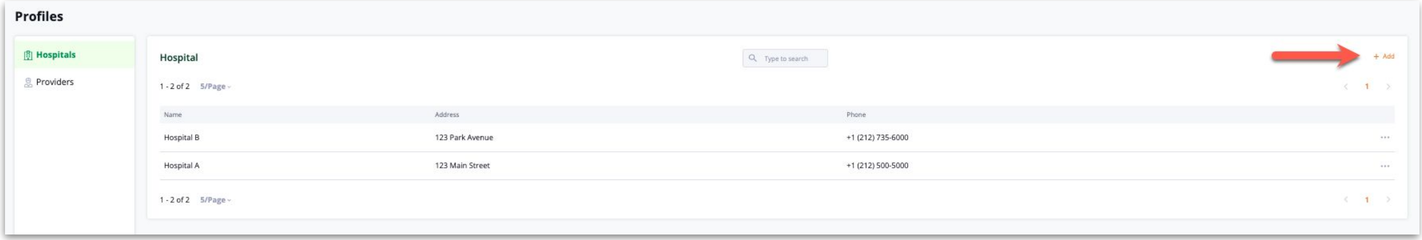
For example, your organization may refer patients to a radiology center or a hospital for testing or in-patient care. With Profiles, you can add these outside providers and associate them to the Patient Profile.

Associated Profiles may be contacted through the patient as determined by your organization's configuration.

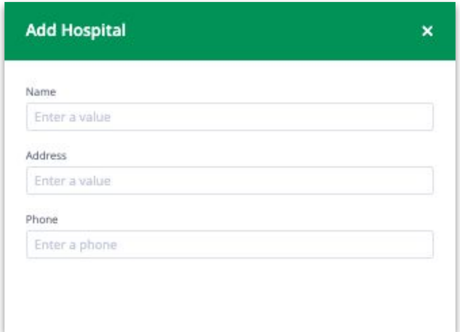


Profiles - Manual Entry

- From the Profiles screen, click on the +Add button 



- A drawer will appear. Enter the Profile data fields.
  Click save once all required fields have been completed.

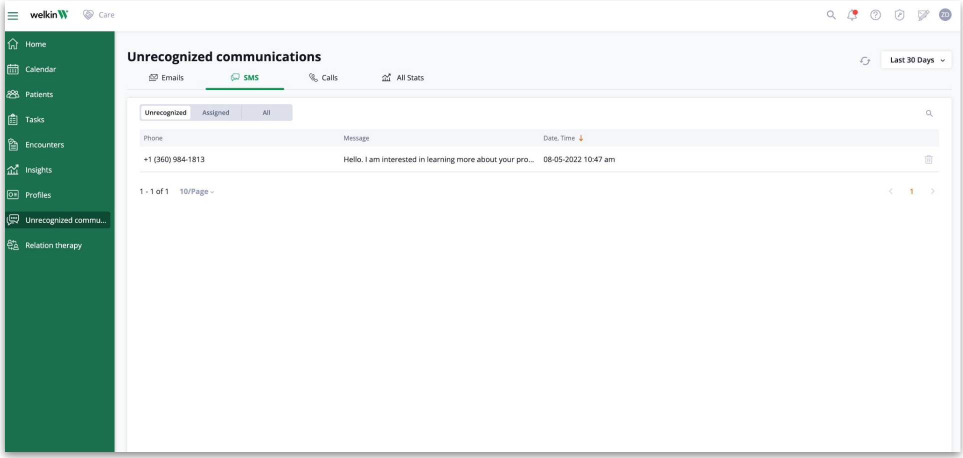


Unrecognized Communications

An Unrecognized Communication is any phone call, text message, or email that is received and not associated with a Patient Profile.

From this screen you can review messages and assign them to care team members within the system. Please note the following:

- Unrecognized communications can be assigned to existing patients:
    - Select the unrecognized communication.
    - A drawer will appear - select the patient/related contact in the drop down.

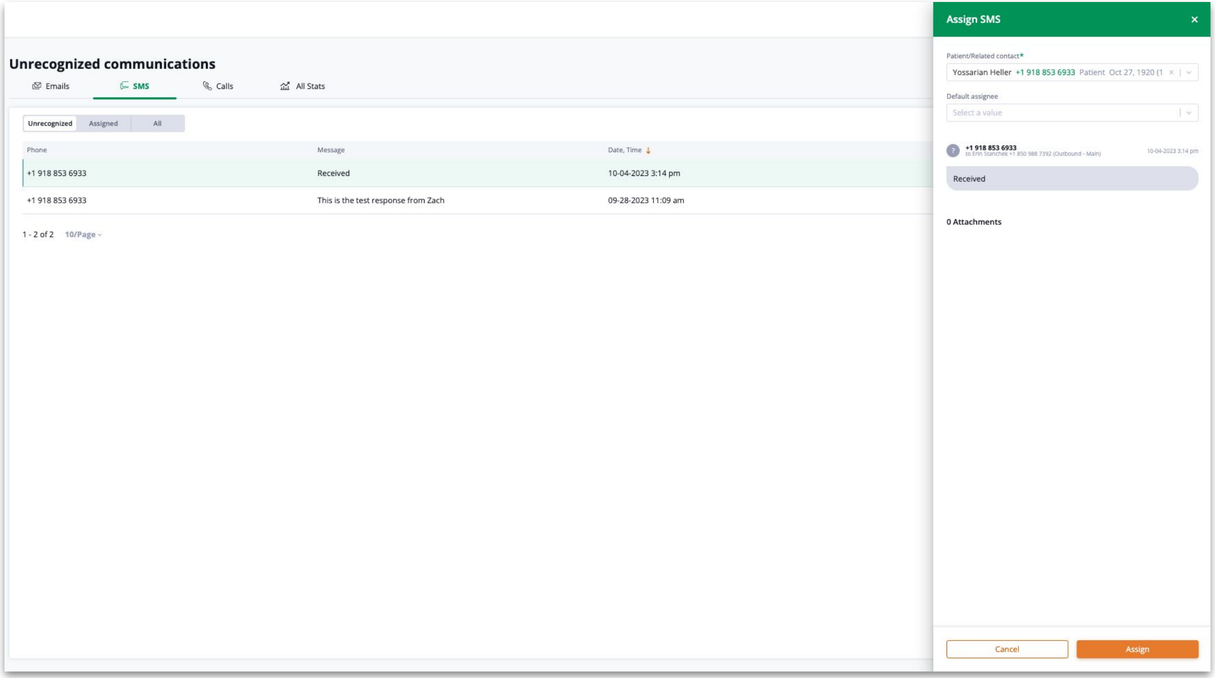


Unrecognized Communications - Assign to Patient

If an Unrecognized Communication can be confirmed to belong to a patient you can assign the communication to them.

Selecting the Unrecognized Communication will open a drawer where the Patient/Related Contact and Default Assignee can be selected.

Click on the “Assign” button at the bottom to associate the communication to the patient.



Any Questions?

This concludes the Care Navigation Training deck.

If you have any questions regarding the topics above, please contact your Implementation Manager.

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Thank you!