



Care Application



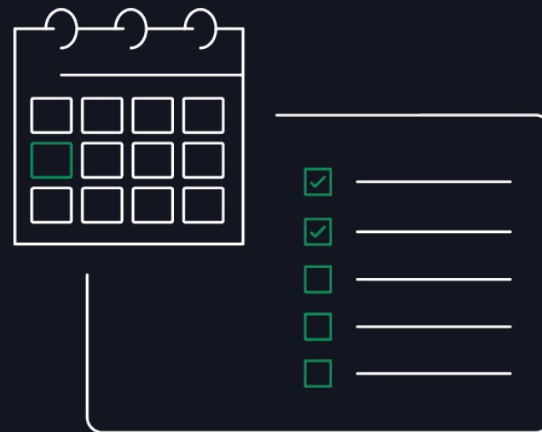
Agenda

- [What is Care?](#)
- [Prerequisites to logging in](#)
- [Home Screen](#)
- [Horizontal Menu](#)
- [Navigation Menu](#)
- [Home Screen](#)
- [Calendar - Navigation](#)
- [Calendar - Working Hours, Events, and Encounters](#)
- [Calendar - Events and Leave](#)
- [Calendar - Encounters](#)
- [Patients](#)
- [Menu Items within the Patient Profile](#)
- [Patient \(Top Menu\)](#)
- [Tasks](#)
- [Tasks - Filtering & Sorting](#)



Agenda

- [Tasks - Manual Creation](#)
- [Encounters](#)
- [Encounter View](#)
- [Encounter Status](#)
- [Encounter Notes](#)
- [Encounter Dispositions](#)
- [Profiles](#)
- [Profiles - Manual Entry](#)
- [Unrecognized Communications](#)
- [Unrecognized Communications - Assign to Patient](#)



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.

Good Afternoon, [User Name]!

3 Events Scheduled for Today (Fri, 28th)

| Time | Event Name | Patient Name |
|---------------------|-------------------|--------------|
| 9:00 am - 10:00 am | New Patient Call | A Patient |
| 11:00 am - 12:00 pm | Follow-up | B Patient |
| 1:00 pm - 2:00 pm | Weekly touch base | C Patient |

3 Overdue & Due Today Tasks

| Due Date | Priority | Task Name | Patient Name |
|----------|----------|---------------------------------|--------------|
| Oct 28 | Low | Check-in on goal progress | A Patient |
| Oct 28 | Urgent | Elevated Personal Risk Outreach | B Patient |
| Oct 28 | Medium | Custom Task | C Patient |

3 New & Unread & Missed Communications

| Received At | Type | Patient Name | Care Team Member |
|--------------------|------|--------------|------------------|
| 10-28-2022 8:59 am | cc | B Patient | [Redacted] |
| 10-28-2022 8:58 am | cc | A Patient | [Redacted] |
| 10-28-2022 8:57 am | cc | A Patient | [Redacted] |

5 In Progress Encounters

| Date, Time | Encounter Name | Patient Name |
|---------------------|-------------------|--------------|
| 05-04-2022 3:00 pm | Follow-up | A Patient |
| 07-13-2022 1:45 pm | Follow-up | A Patient |
| 07-14-2022 12:00 pm | Weekly touch base | B Patient |
| 10-06-2022 10:00 am | New Patient Call | A Patient |
| 10-28-2022 9:00 am | New Patient Call | A Patient |

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.

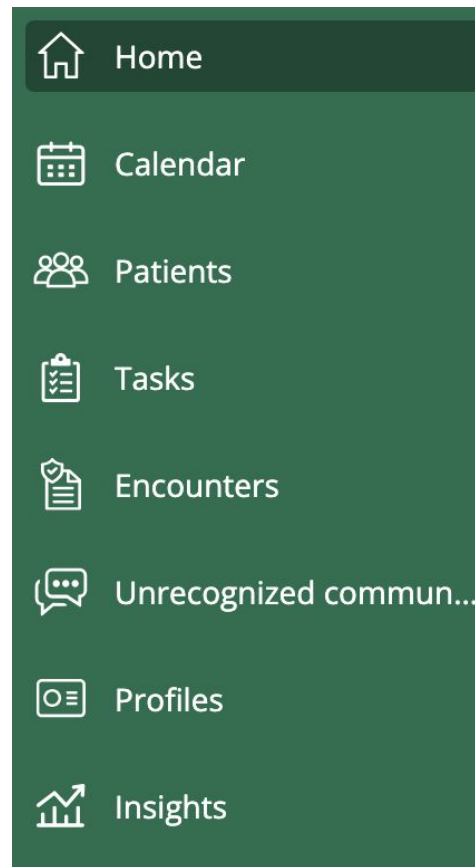


Navigation Menu

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

The screenshot displays the Weixin Care Home Screen with a green sidebar on the left containing navigation options: Home, Calendar, Patients, Tasks, Encounters, Insights, Profiles, and Unregistered comm... The main content area is titled "Good Afternoon, [User Name]" and features several widgets:

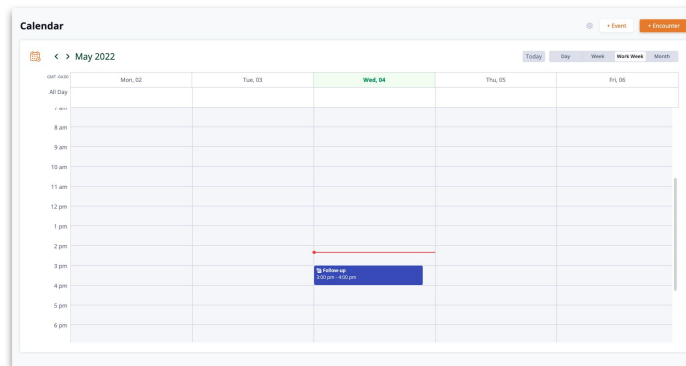
- 3 Events Scheduled for Today (Fri, 28th)**: A table with columns for Time, Event Name, and Patient Name. It lists three events: "New Patient Call" (10:00 am - 10:00 am), "Follow-up" (11:00 am - 12:00 pm), and "Weekly touch base" (1:00 pm - 2:00 pm).
- 3 New & Unread & Missed Communications**: A table with columns for Received At, Type, Patient Name, and Care Team Member. It lists three items received between 8:59 am and 9:57 am on 10-28-2022.
- 5 In Progress Encounters**: A table with columns for Date/Time, Encounter Name, and Patient Name. It lists five encounters from 05-04-2022 to 10-28-2022.
- 3 Overdue & Due Today Tasks**: A table with columns for Due Date, Priority, Task Name, and Patient Name. It lists three tasks due on Oct 28 with priorities Low, Urgent, and Medium.
- 3 Urgent & High Priority Tasks**: A table with columns for Due Date, Priority, Task Name, and Patient Name. It lists three urgent tasks due on Oct 28.

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.

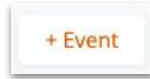


Calendar - Working Hours, Events, and Encounters

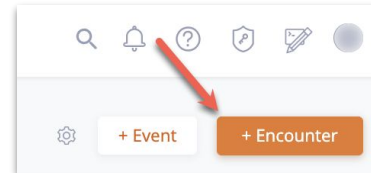
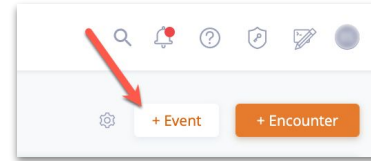
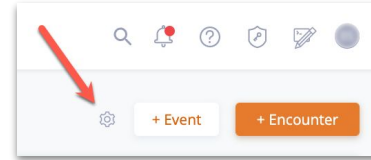
- The gear icon allows the care team member to input their working hours.



- 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.

New Event

Event Leave

Add Title

10/31/2022 All Day

12:00 PM 1:00 PM (GMT -04:00) Eastern time

No Repeat

In-Person Call Video

Organizer

Erin Stanchek 12:00 PM (US/Eastern)

Participants

Select Care Team Member

Event Description

Enter Description

Cancel Save



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.



New Encounter

Search by Encounter Template, Disposition Group

- Follow-up Patient Facing
- Glucose Check Touch base
- New Patient Call Phone
- Weekly touch base Touch Base

Cancel

Follow-up

10/28/2022

2:00 PM 3:00 PM (GMT-04:00) Eastern time

No Rep...

In-Person Call Video

Care Team Member

2:00 PM (US/Eastern) outside working h

Patient*

Select Patient

Encounter Description

This is an opportunity to see how the patient is doing after their last engagement.

Special notes

Special notes

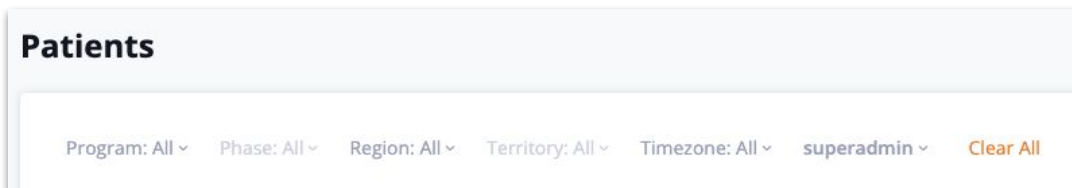
Cancel Save



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



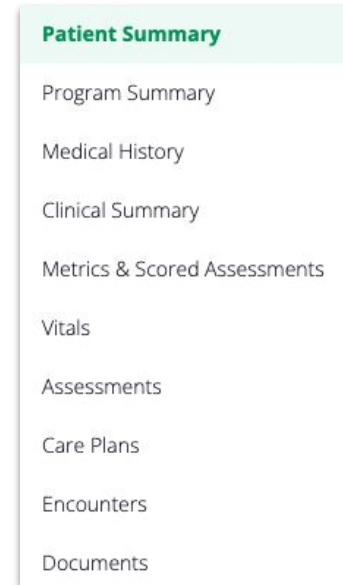
The screenshot shows a user interface for filtering patients. At the top, the word "Patients" is displayed in a bold, black font. Below this, there is a horizontal row of filter options, each consisting of a label followed by a downward-pointing chevron: "Program: All", "Phase: All", "Region: All", "Territory: All", and "Timezone: All". To the right of these filters, the text "superadmin" is displayed with a downward chevron, and further right is a "Clear All" button in orange text.

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.

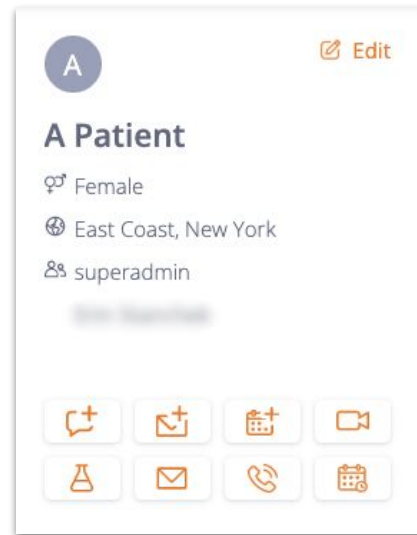


Patient (Top Menu)

Shows demographics of the selected patient such as:

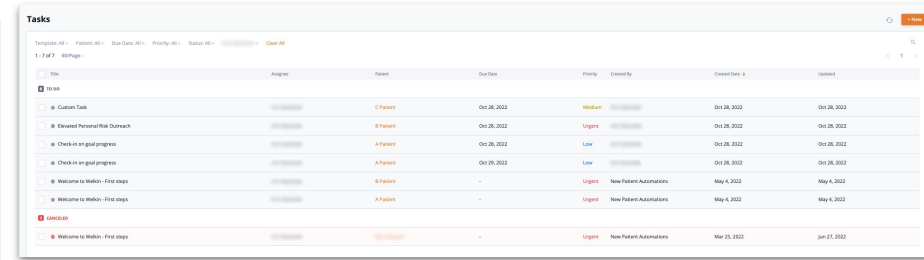
- date of birth
- address
- etc.

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

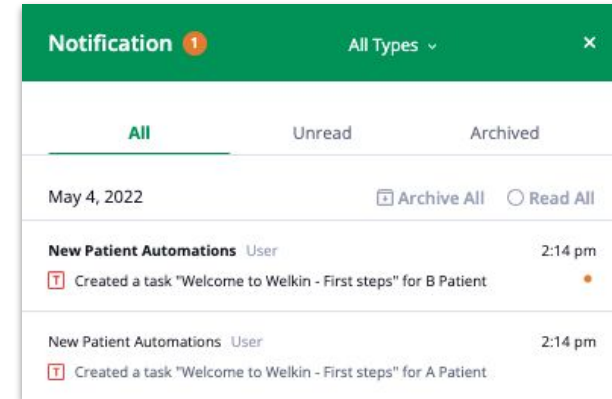


Tasks

- 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



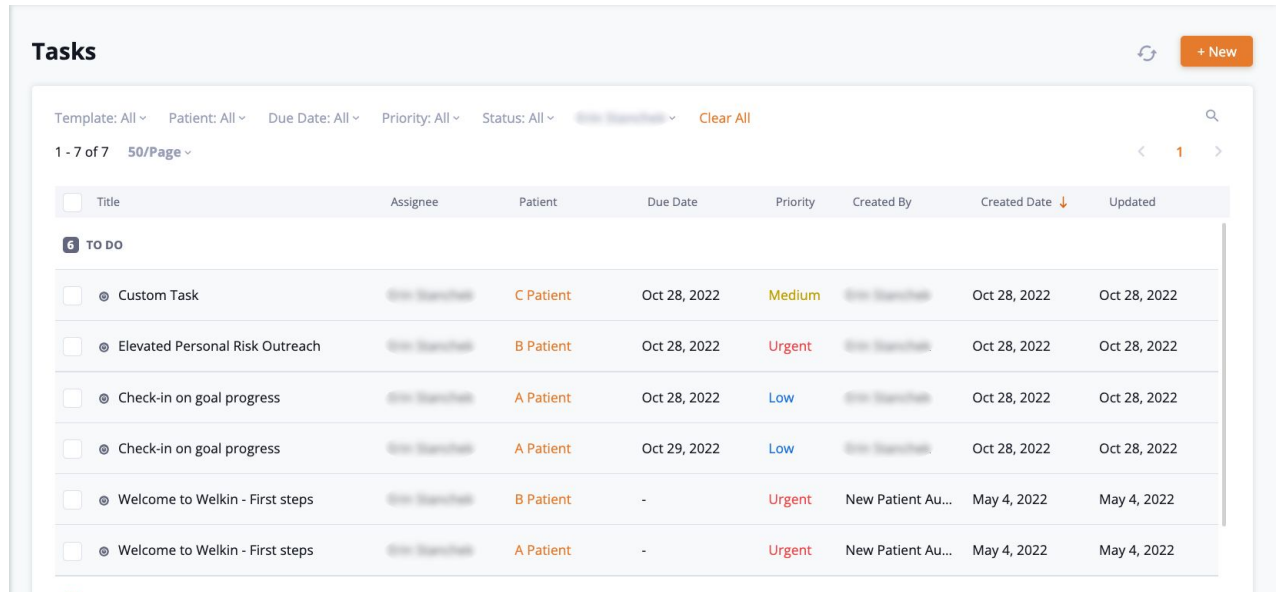
| Task | Assignee | Patient | Due Date | Priority | Created By | Creation # | Updated |
|---------------------------------|----------|-----------|--------------|----------|-------------------------|--------------|--------------|
| Custom Task | MediCare | C Patient | Oct 26, 2022 | Medium | MediCare | Oct 26, 2022 | Oct 26, 2022 |
| Elevated Personal Risk Outreach | MediCare | B Patient | Oct 26, 2022 | Urgent | MediCare | Oct 26, 2022 | Oct 26, 2022 |
| Check in on goal progress | MediCare | A Patient | Oct 26, 2022 | Low | MediCare | Oct 26, 2022 | Oct 26, 2022 |
| Welcome to Welkin - First steps | MediCare | A Patient | Oct 26, 2022 | Low | MediCare | Oct 26, 2022 | Oct 26, 2022 |
| Welcome to Welkin - First steps | MediCare | B Patient | - | Urgent | New Patient Automations | May 4, 2022 | May 4, 2022 |
| Welcome to Welkin - First steps | MediCare | A Patient | - | Urgent | New Patient Automations | May 4, 2022 | May 4, 2022 |
| Welcome to Welkin - First steps | MediCare | B Patient | - | Urgent | New Patient Automations | Mar 25, 2022 | Jun 27, 2022 |



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.




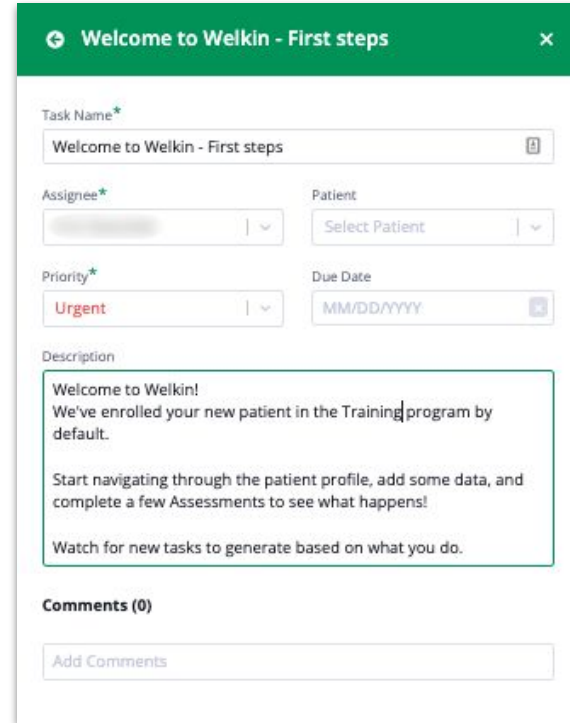
The screenshot displays the 'Tasks' management interface. At the top, there are filter options for Template, Patient, Due Date, Priority, and Status, along with a 'Clear All' button and a '+ New' button. Below the filters, the table shows a list of tasks. The first task is under a 'TO DO' section. The table columns are: Title, Assignee, Patient, Due Date, Priority, Created By, Created Date, and Updated.

| <input type="checkbox"/> | Title | Assignee | Patient | Due Date | Priority | Created By | Created Date | Updated |
|--------------------------|---------------------------------|--------------|-----------|--------------|----------|-------------------|--------------|--------------|
| <input type="checkbox"/> | Custom Task | View Details | C Patient | Oct 28, 2022 | Medium | View Details | Oct 28, 2022 | Oct 28, 2022 |
| <input type="checkbox"/> | Elevated Personal Risk Outreach | View Details | B Patient | Oct 28, 2022 | Urgent | View Details | Oct 28, 2022 | Oct 28, 2022 |
| <input type="checkbox"/> | Check-in on goal progress | View Details | A Patient | Oct 28, 2022 | Low | View Details | Oct 28, 2022 | Oct 28, 2022 |
| <input type="checkbox"/> | Check-in on goal progress | View Details | A Patient | Oct 29, 2022 | Low | View Details | Oct 28, 2022 | Oct 28, 2022 |
| <input type="checkbox"/> | Welcome to Welkin - First steps | View Details | B Patient | - | Urgent | New Patient Au... | May 4, 2022 | May 4, 2022 |
| <input type="checkbox"/> | Welcome to Welkin - First steps | View Details | A Patient | - | Urgent | New Patient Au... | May 4, 2022 | May 4, 2022 |



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



The screenshot shows a task creation form titled "Welcome to Welkin - First steps". The form includes the following fields:

- Task Name***: A text input field containing "Welcome to Welkin - First steps".
- Assignee***: A dropdown menu with a blurred selection.
- Patient**: A dropdown menu with the text "Select Patient".
- Priority***: A dropdown menu with "Urgent" selected.
- Due Date**: A date input field with the placeholder "MM/DD/YYYY".
- Description**: A text area containing the following text:

Welcome to Welkin!
We've enrolled your new patient in the Training program by default.

Start navigating through the patient profile, add some data, and complete a few Assessments to see what happens!

Watch for new tasks to generate based on what you do.
- Comments (0)**: A section with an "Add Comments" input field.

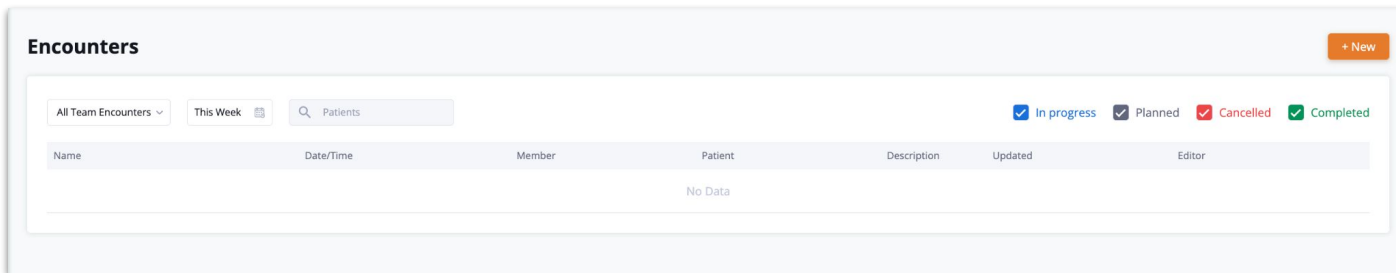


Encounters

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.



| Name | Date/Time | Member | Patient | Description | Updated | Editor |
|---------|-----------|--------|---------|-------------|---------|--------|
| No Data | | | | | | |



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)

The screenshot displays the 'Follow-up' encounter view. At the top, it shows the title 'Follow-up' with a status of 'PLANNED' and a dropdown arrow. Below the title, it indicates the creation time: 'Created: Sep 29, 2022 - 9:31 am'. The main content is divided into several sections:

- Details:** Shows the encounter event as 'Sep 29, 2022 - 10:00 am - 11:00 am (US/Eastern)'. It includes fields for 'Patient' (A Patient) and 'Care Team Member' (a blurred name). There are options for 'Video' and 'Format'. A template is selected: 'Follow-up (Patient Facing)', with a description: 'This is an opportunity to see how the patient is doing after their last engagement.'
- Instructions:** Contains three bullet points: 'Complete a visit note and observations', 'Complete a new SDOH, if patient is willing.', and 'If PHQ-9 is appropriate, add to the encounter and complete.'
- Notes & Assessments:** A table listing completed notes and assessments.

| Name | Started Date | Started By | Completed Date | Completed By | Status |
|--------------------|--------------|------------|----------------|--------------|-----------|
| PHQ-9 | Sep 29, 2022 | [blurred] | Sep 29, 2022 | [blurred] | Completed |
| General Visit Note | Sep 29, 2022 | [blurred] | Sep 29, 2022 | [blurred] | Completed |

- View encounter disposition:** Shows 'Disposition' as '-' and 'CPT' as '-'.
- Comments:** A text input field with a placeholder 'Write a comment...' and a submit button. Below it, it says 'No Comments'.

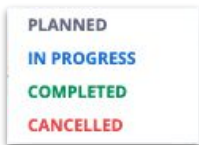


Encounter Status

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

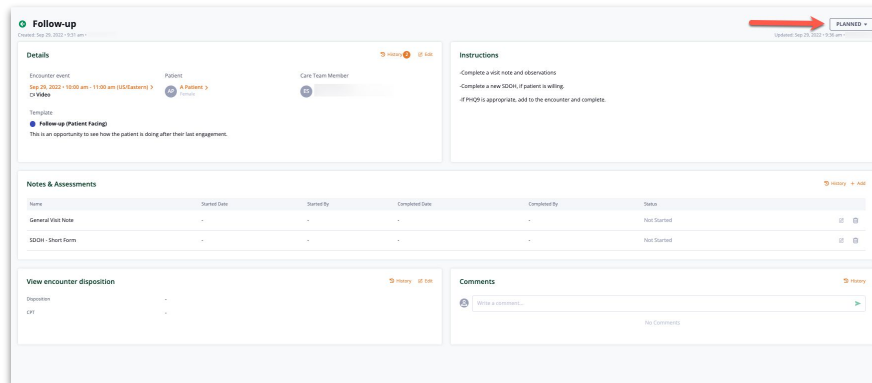
There are four statuses:

- 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

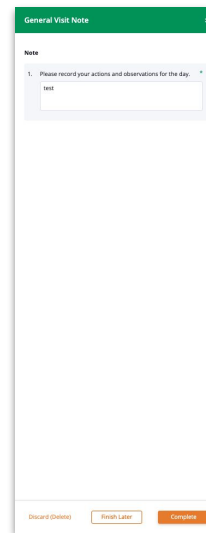
To start recording visit notes or Assessments for this patient, click on the pencil and paper icon of the line item you want to complete. 

| Name | Started Date | Started By | Completed Date | Completed By | Status | |
|--------------------|--------------|------------|----------------|--------------|-------------|---|
| General Visit Note | Sep 29, 2022 | | - | - | In Progress |   |
| SDOH - Short Form | - | - | - | - | Not Started |   |

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.



General Visit Note

Note

1. Please record your actions and observations for the day.

text

Discard (Delete) Finish Later Complete



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.

The screenshot displays a 'New Patient Call' encounter interface. At the top, it shows the title 'New Patient Call', creation and update timestamps, and an 'IN PROGRESS' status. The 'Details' section includes the encounter event (Oct 28, 2022 - 9:00 am - 10:00 am (US/Eastern)), patient information (A Patient), and care team member. A template 'New Patient Call (Phone)' is selected. The 'Notes & Assessments' section contains a table with one entry: 'General Visit Note' started on Oct 6, 2022, completed on Oct 28, 2022, by a user, with a status of 'Completed'. The 'View encounter disposition' section shows a 'Disposition' field with a red arrow pointing to 'CPT' and a 'Completed' field with a red arrow pointing to '143'. A red arrow also points to the 'Edit' button in the disposition section. The 'Instructions' section provides guidance on completing a visit note. The 'Comments' section is currently empty.

| Name | Started Date | Started By | Completed Date | Completed By | Status |
|--------------------|--------------|------------|----------------|--------------|-----------|
| General Visit Note | Oct 6, 2022 | [User] | Oct 28, 2022 | [User] | Completed |

Disposition: CPT Completed: 143

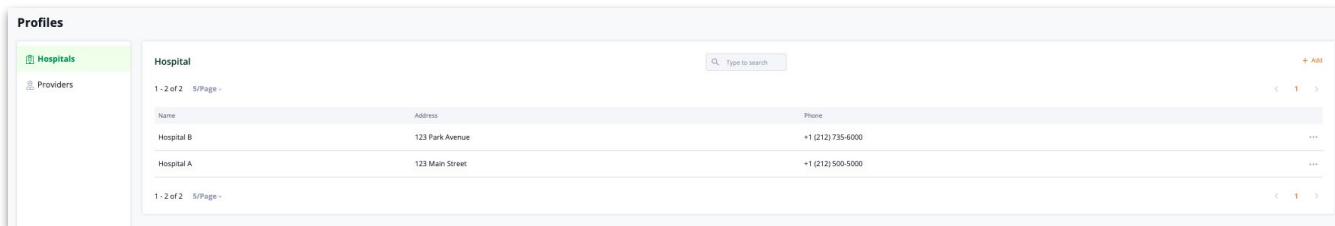


Profiles

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.



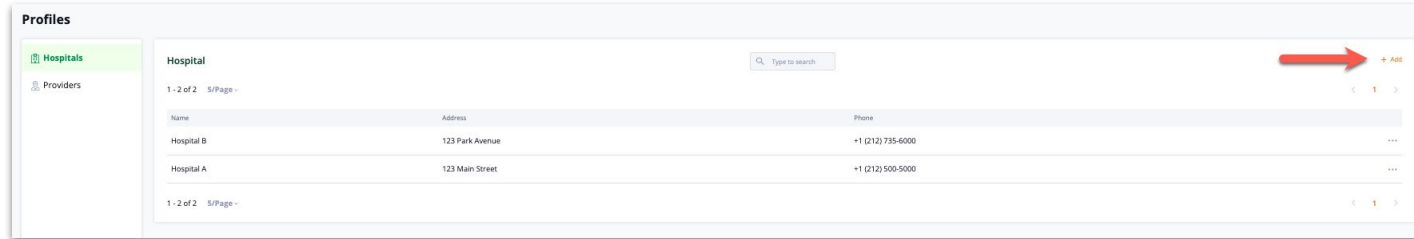
The screenshot displays the 'Profiles' section of the Welkin interface. On the left, a navigation menu shows 'Hospitals' selected and 'Providers' below it. The main content area is titled 'Hospital' and features a search bar with the placeholder text 'Type to search'. Below the search bar, there is a table listing two hospitals. The table has columns for 'Name', 'Address', and 'Phone'. The first row lists 'Hospital B' at '123 Park Avenue' with phone number '+1 (212) 735-6000'. The second row lists 'Hospital A' at '123 Main Street' with phone number '+1 (212) 500-5000'. Each row has a three-dot menu icon to its right. At the top right of the table area, there is a '+ Add' button. The table is flanked by pagination controls showing '1 - 2 of 2' and '5/ Page -'.

| Name | Address | Phone |
|------------|-----------------|-------------------|
| Hospital B | 123 Park Avenue | +1 (212) 735-6000 |
| Hospital A | 123 Main Street | +1 (212) 500-5000 |



Profiles - Manual Entry

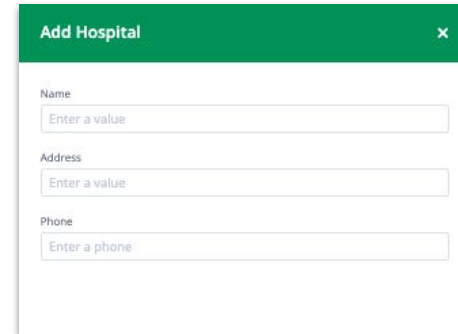
- From the Profiles screen, click on the +Add button



The screenshot shows a mobile application interface for managing profiles. On the left, there is a sidebar with 'Hospitals' selected. The main area is titled 'Hospital' and contains a search bar and a table of hospital profiles. A red arrow points to a '+ Add' button in the top right corner.

| Name | Address | Phone |
|------------|-----------------|-------------------|
| Hospital B | 123 Park Avenue | +1 (212) 735-6000 |
| Hospital A | 123 Main Street | +1 (212) 500-5000 |

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



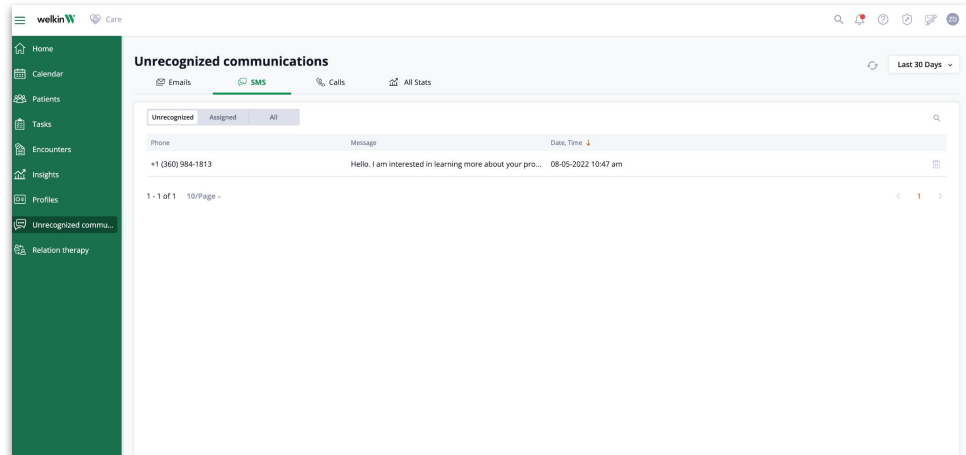
The 'Add Hospital' form is a modal drawer with a green header. It contains three input fields for 'Name', 'Address', and 'Phone', each with a placeholder 'Enter a value'.

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.

The screenshot displays a software interface for managing communications. The main window is titled "Unrecognized communications" and has tabs for "Emails", "SMS", "Calls", and "All Stats". The "SMS" tab is active, showing a table of unrecognized messages. The table has columns for "Phone", "Message", and "Date, Time".

| Phone | Message | Date, Time |
|-----------------|-------------------------------------|---------------------|
| +1 918 853 6933 | Received | 10-04-2023 3:14 pm |
| +1 918 853 6933 | This is the test response from Zach | 09-28-2023 11:09 am |

Below the table, it shows "1 - 2 of 2" and "10/Page".

A drawer titled "Assign SMS" is open on the right side. It shows the "Patient/Related contact*" as "Yossarian Heller +1 918 853 6933 Patient Oct 27, 1920 (1)". There is a "Default assignee" field with a dropdown menu. Below this, the phone number "+1 918 853 6933" is listed with a "Received" status. At the bottom of the drawer, there are "Cancel" and "Assign" buttons.



Any Questions?

This concludes the Care Navigation Training deck.

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





Thank you!