

# Create Authorization

The screenshot shows a patient care plan summary for 'Careplan Test'. The interface includes a left sidebar with patient details and a main content area with various sections. A blue box highlights the 'Programs' section, which lists 'ICC - Intense Care Coordination'. A green annotation with an arrow points to the 'Share Care Plan' button, stating 'Client must be enrolled in a program'.

**Summary** | Plan | Programs | Data | History | Team

**Careplan Test**  
23 Years  
1/1/1999  
Male  
Priority: Not Set  
Virtual Record

**Goals**  
Behavioral Health  
Probation  
Housing  
Healthcare

**Actions**  
Client Actions  
Open: 0  
Completed: 0  
Care Team Actions  
Open: 1  
Completed: 0

**Care Team**  
Lisa Row  
WPC - Special Projects Manager

**Conditions**  
No Records

**Personal Background**  
No Records

**Notes Highlights**  
Month

**Programs**  
ICC - Intense Care Coordination

**Assessments**  
No Records

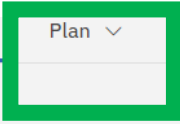
**Risks**  
No Records


**Housing History**  
No Records

**Share Care Plan** | Customize Summary

Client must be enrolled in a program

Click on "Plan"



  
**Careplan Test**  
23 Years  
1/1/1999  
Male  
Priority: Not Set  
[Virtual Record](#)


Actions ▾






























**Address**  
Unknown

**Phone**  
Unknown

**Programs**  
ICC - Intense Care Coordination

Summary **Plan** ▾ Programs ▾ Data History ▾ Team ▾

Summary Share Care Plan Customize Summary 

<b>Goals</b>   Behavioral Health Probation Housing Healthcare	<b>Actions</b> Client Actions Open 0 Completed 0 Care Team Actions Open 1 Completed 0 <b>Latest Note</b>   No Records <b>Health Background</b>   No Records <b>Application Submitted and ...</b>  No Records	<b>Care Team</b>    Lisa Row WPC - Special Projects Manager <b>Conditions</b>   No Records <b>Personal Background</b>   No Records <b>Notes Highlights</b>        Month ▾ All No Records	<b>Programs</b>   ICC - Intense Care Coordination <b>Barriers</b>   No Records <b>Current Medications</b>   No Records	<b>Assessments</b>  No Records <b>Risks</b>  No Records <b>Housing History</b> No Records
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Go to Goals and click on the +. Type in "authorization" below you will see "Complete Client Authorization Form" click on it.

The screenshot displays the IBM Watson Care Manager interface. On the left, a sidebar shows the patient profile for 'Careplan Test', including age (23 Years), date of birth (1/1/1999), gender (Male), and priority (Not Set). The main content area is titled 'Plan' and features a navigation menu with 'Summary', 'Plan', 'Programs', 'Data', 'History', and 'Team'. The 'Goals' section is active, showing a search bar with the text 'authorization' and a dropdown menu with the following items: 'Complete Client Authorization Form' (highlighted with a green box and a green arrow pointing to it) and 'New Goal'. Below the search, a table lists activities, with one entry: 'Linkage to behavioral health outreach' assigned to 'Jacob Redd' with a status of 'Ongoing' and a progress indicator of five empty circles.

IBM Watson Care Manager

Summary Plan Programs Data History Team

Plan

Activities 22 +

Goals 2 +

authorization

Complete Client Authorization Form +

New Goal +

Showing 1 of 1 Show Open

Name	Assigned To	Status	Progress
Linkage to behavioral health outreach	Jacob Redd	Ongoing	○ ○ ○ ○ ○



### Careplan Test

23 Years  
1/1/1999  
Male  
Priority: Not Set

Virtual Record

Actions

Address

Unknown

Phone

Unknown

Programs

ICC - Intense Care  
Coordination

Activities

Goals

Behavioral H

1

Healthcare

Housing

Probation

Barriers

## Complete Client Authorization Form



Programs ICC - Intense Care Coordination

Source Watson Care Manager

Original Source Watson Care Manager

Focus Areas Select option(s)

Type

Start Date 11 / 18 / 2022

Target Value

Target Date mm / dd / yyyy

Stage of Change

Confidence

Importance

Reason

Source: change to  
Watson Care  
Manager

1. Client needs to be  
enrolled in a program  
before you can add a  
goal. If client is not in  
WCM please refer to the  
training on the CPP  
website

2. Click save

Save Cancel



### Careplan Test

23 Years  
1/1/1999  
Male  
Priority: Not Set

[Virtual Record](#)

Actions ▾

#### Address

Unknown

#### Phone

Unknown

#### Programs

ICC - Intense Care  
Coordination

**Return to the Summary page, and look under Goals, if it is not there, the click on the Goal →**

## Summary

[Share Care Plan](#) [Customize Summary](#)

<p>Goals </p> <p>Behavioral Health</p> <p>Probation</p> <p>Housing</p> <p>Healthcare</p>	<p>Actions</p> <p>Client Actions</p> <table border="1"><tr><td>Open</td><td>0</td></tr><tr><td>Completed</td><td>0</td></tr></table> <p>Care Team Actions</p> <table border="1"><tr><td>Open</td><td>1</td></tr><tr><td>Completed</td><td>0</td></tr></table>	Open	0	Completed	0	Open	1	Completed	0	<p>Care Team  </p> <p> Lisa Row WPC - Special Projects Manager</p>	<p>Programs  </p> <p>ICC - Intense Care Coordination</p>	<p>Assessments </p> <p>No Records</p>
Open	0											
Completed	0											
Open	1											
Completed	0											
<p>Latest Touchpoint  </p> <p>No Records</p>	<p>Latest Note  </p> <p>No Records</p>	<p>Conditions  </p> <p>No Records</p>	<p>Barriers  </p> <p>No Records</p>	<p>Risks </p> <p>No Records</p>								
<p>Social Background  </p> <p>No Records</p>	<p>Health Background  </p> <p>No Records</p>	<p>Personal Background  </p> <p>No Records</p>	<p>Current Medications  </p> <p>No Records</p>	<p>Housing History</p> <p>No Records</p>								
<p>Housing Needs </p> <p>No Records</p>	<p>Application Submitted and ... </p> <p>No Records</p>	<p>Notes Highlights </p> <p> </p> <p> Month ▾</p> <p>All</p> <p>No Records</p>										



### Careplan Test

23 Years  
1/1/1999  
Male

Priority: Not Set

Virtual Record

Actions

#### Address

Unknown

#### Phone

Unknown

## Goals

Showing 5 of 5

Show Open

Name	Outcome	Target Date	Progress
Behavioral Health	Pending		
Complete Client Authorization Form	Pending		
Healthcare	Pending		
Housing	Pending		
Probation	Pending		

Click on Complete Client Authorization Form

**Careplan Test**  
23 Years  
1/1/1999  
Male  
Priority: Not Set  
[Virtual Record](#)

**Address**  
Unknown

**Phone**  
Unknown

**Programs**  
ICC - Intense Care Coordination

Complete Client Authorization Form

Details

Source	Watson Care Manager	Original Source System	Watson Care Manager
Focus Areas		Type	
Target Value		Stage of Change	
Importance		Added By	Lisa Row
Start Date	11/18/2022	Target Date	
Confidence		Added On	11/18/2022
Added Reason			
References	<a href="https://ochca.preprod.simpligov.com/preprod/portal/ShowWorkFlow/ShowWorkflowDetail/5a2157dc-c524-4bbb-97f7-161fd33d1b18">https://ochca.preprod.simpligov.com/preprod/portal/ShowWorkFlow/ShowWorkflowDetail/5a2157dc-c524-4bbb-97f7-161fd33d1b18</a>		

← Click here

Once you click on the link, you will be brought to a new website, SimpliGov, containing the form to fill out

Progress

Added On	Added by	Progress	Comment
No Records			

Programs

Name	Status	Updated By
ICC - Intense Care Coordination	Enrolled on 6/25/2021 4:35 PM	Jacob Redd

# Want to add an alert?

The screenshot displays the IBM Watson Care Manager interface for a care plan titled "Careplan Test". The interface includes a navigation bar with tabs for Summary, Plan, Programs, Data, History, and Team. The main content area is divided into several sections: Goals, Actions, Care Team, Programs, Assessments, Risks, Housing History, Latest Touchpoint, Latest Note, Health Background, Social Background, Application Submitted and..., Housing Needs, Conditions, Barriers, Current Medications, Personal Background, and Notes Highlights. A red box highlights the "Actions" dropdown menu, which is open and shows options: New Task, New Note, New Touchpoint, New Alert, New Referral, Update Photo, Update Priority, Activate, Deactivate, and Delete Client. A red arrow points to the "Actions" dropdown, and a green arrow points to the "New Alert" option.

IBM Watson Care Manager

Summary Plan Programs Data History Team

Careplan Test

23 Years  
1/1/1999  
Male  
Priority: Not Set

Virtual Record

Actions

- New Task
- New Note
- New Touchpoint
- New Alert
- New Referral
- Update Photo
- Update Priority
- Activate
- Deactivate
- Delete Client

Goals

Behavioral Health

Probation

Housing

Healthcare

Actions

Client Actions

Open	0
Completed	0

Care Team Actions

Open	1
Completed	0

Latest Note

No Records

Health Background

No Records

Social Background

No Records

Housing Needs

No Records

Care Team

Lisa Row  
WPC - Special Projects  
Manager

Conditions

No Records

Personal Background

No Records

Notes Highlights

Month

All

No Records

Programs

ICC - Intense Care  
Coordination

Assessments

No Records

Risks

No Records

Housing History

No Records

Share Care Plan Customize Summary

Click on  
"Actions" and a  
drop down will  
appear

Then click on  
"New Alert"





### Careplan Test

23 Years  
1/1/1999  
Male  
Priority: Not Set

Alerts (1)  
Virtual Record

## New Alert



\* required field

Name \*

Source

Original Source System

Priority \*

Note

Notify

- Client has an update to their list of physical addresses.
- Client has an update to their list of phone numbers.
- Client has an update to their list of e-mail addresses.
- Client has an update to their primary insurance provider.
- Client participating in CalWORKs has an update to their felony conviction status.
- Client has an update to their income source and/or amount.
- This Client's authorization expires within 4 weeks.
- This Client's authorization expires within 2 weeks
- Sample Alert
- Client Authorization**
- Client Authorization 2
- Criminal Activity
- Change of Family Composition
- Income Change
- Failure to report in any manner to probation appointment(s)

Click "Client Authorization" →



### Careplan Test

23 Years

1/1/1999

Male

Priority: Not Set

Alerts (1)

Virtual Record

ations

dress

known

one

known

ograms

C - Intense Care

ordination

## New Alert

\* required field

Name \* Client Authorization

Source Watson Care Manager

Original Source System Watson Care Manager

Priority \*

Note

Notify

- Critical
- High
- Medium
- Low

Click the Priority



IBM Watson Care Manager

Summary Plan Programs Data History Team

Summary

Share Care Plan Customize Summary

Goals Actions Care Team Programs Assessments

Behavioral Health Probation Housing Healthcare

Latest Touchpoints Social Backgrounds Housing Needs

23 Years  
1/1/1999  
Male  
Priority: Not Set

Virtual Record

Actions

Address  
Unknown

Phone  
Unknown

Programs  
ICC - Intense Care Coordination

**New Alert**

\* required field

Name \* Client Authorization

Source Watson Care Manager

Original Source System Watson Care Manager

Priority \* High

Note  
Have client sign Authorization

Notify  
WPC - Special Projects Manager ...  
 WPC - Special Projects Manager - Lisa Row

Save Cancel

1. Click "Notify" and click the care team member. If you want it to go to a specific person.

2. Click "Save"

The Alert will be on the Summary page

The screenshot shows the IBM Watson Care Manager interface. The main header includes navigation tabs: Summary, Plan, Programs, Data, History, and Team. The page title is 'Summary' with options to 'Share Care Plan' and 'Customize Summary'. The left sidebar shows patient information for 'Careplan Test', including age (23 years), date of birth (1/1/1999), and a red alert icon with 'Alerts (1)'. A green arrow points from the text above to this alert icon. A popup window displays the alert details: 'Client Authorization High' on '11/18/2022, 12:13 PM' by 'Lisa Row', with the instruction 'Have client sign Authorization'. The main content area is divided into several sections: 'Goals' (Behavioral Health), 'Actions' (Client Actions: 0 Open, 0 Completed; Care Team Actions: 1 Open, 0 Completed), 'Latest Note' (Alert: Have client sign Authorization), 'Health Background', 'Application Submitted and ...', 'Care Team' (Lisa Row, WPC - Special Projects Manager), 'Conditions' (No Records), 'Personal Background' (No Records), 'Notes Highlights' (Month filter, All), 'Programs' (ICC - Intense Care Coordination), 'Current Medications' (No Records), 'Assessments' (No Records), 'Risks' (No Records), and 'Housing History' (No Records).