UCMS - Universal Case Management System

UCMS is the foundation of our business – it is what allows us to perform at the highest level:It is the only unified global case management system developed exclusively for the EAP industry that is compliant with data protection regulations worldwide, and creates efficiencies and consistency for service delivery and reporting to clients – it is used by all of our service centers and local service delivery partners.

Why is it important?

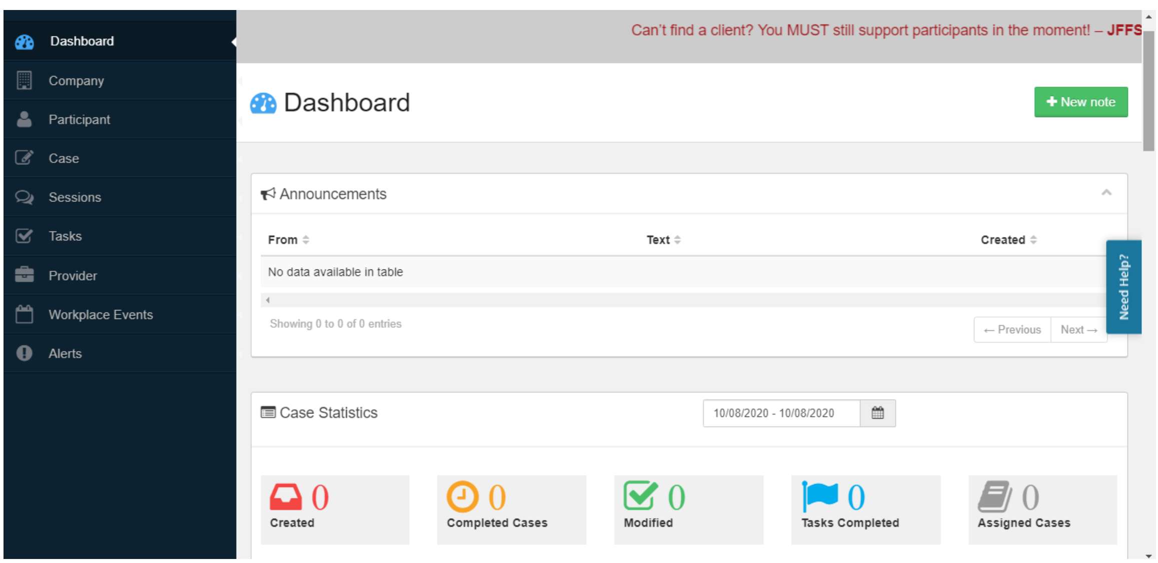
- For consistent case management
- For consistent global reporting and country by country comparative data
- It is a market differentiator.

By using UCMS correctly, the data produced allows us to prospect for new business using the latest trending analysis and allows us both to retain the mutual business.

This document contains updated step by step instructions to support our partners in entering data into UCMS accurately.

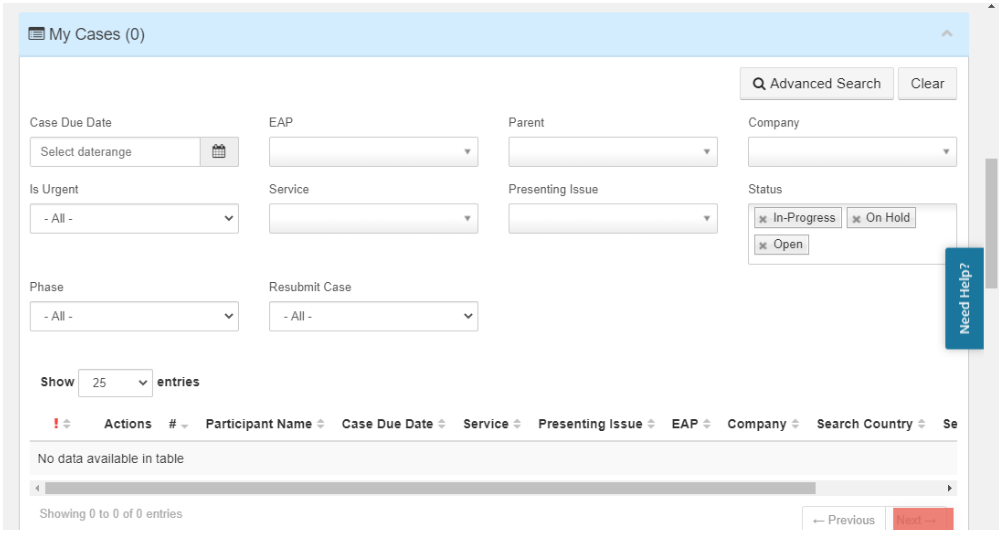
The Dashboard:

1. UCMS Dashboard upon login



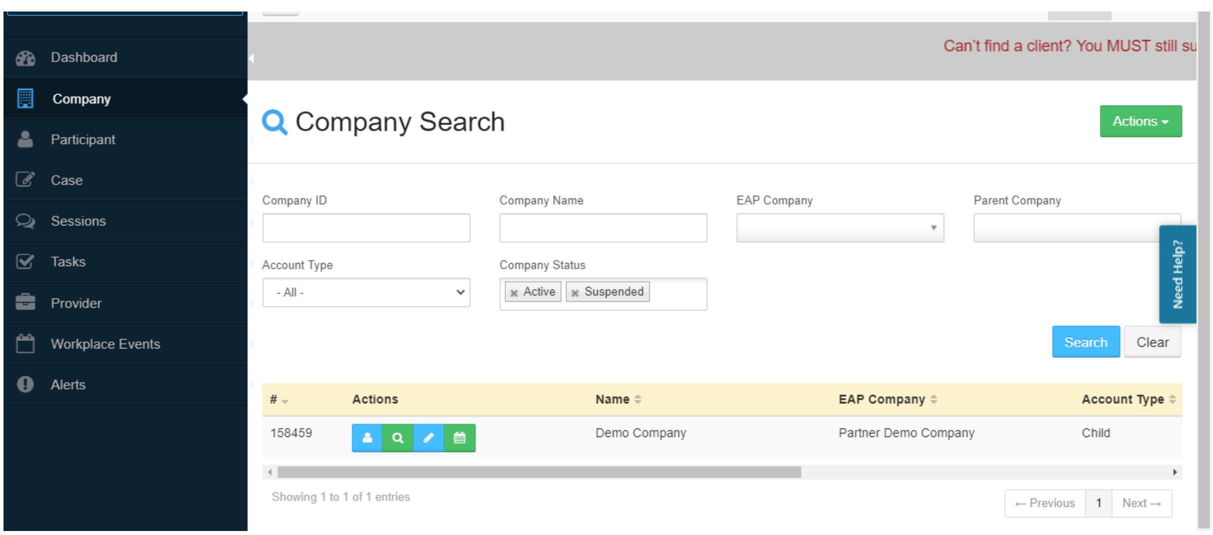
- By scrolling down on your dashboard, you will see the cases you have created as a user.
- You can choose which cases you want to see, either open cases, closed cases, or all cases by selecting the status.

*Please see recent clinical policies as pertain to UCMS use



Creating a new Clinical Case:

1. Start by selecting the company the caller is associated with.
2. You can enter in the name of the company in order to search for it. You should also see a list of all the companies you are serving on behalf of WPO and can select the correct company from the list.
3. To create a new participant, select the icon shaped like a person



4. Enter the demographic information first name and last name, phone number, email address and full address for the participant here at the next screen.

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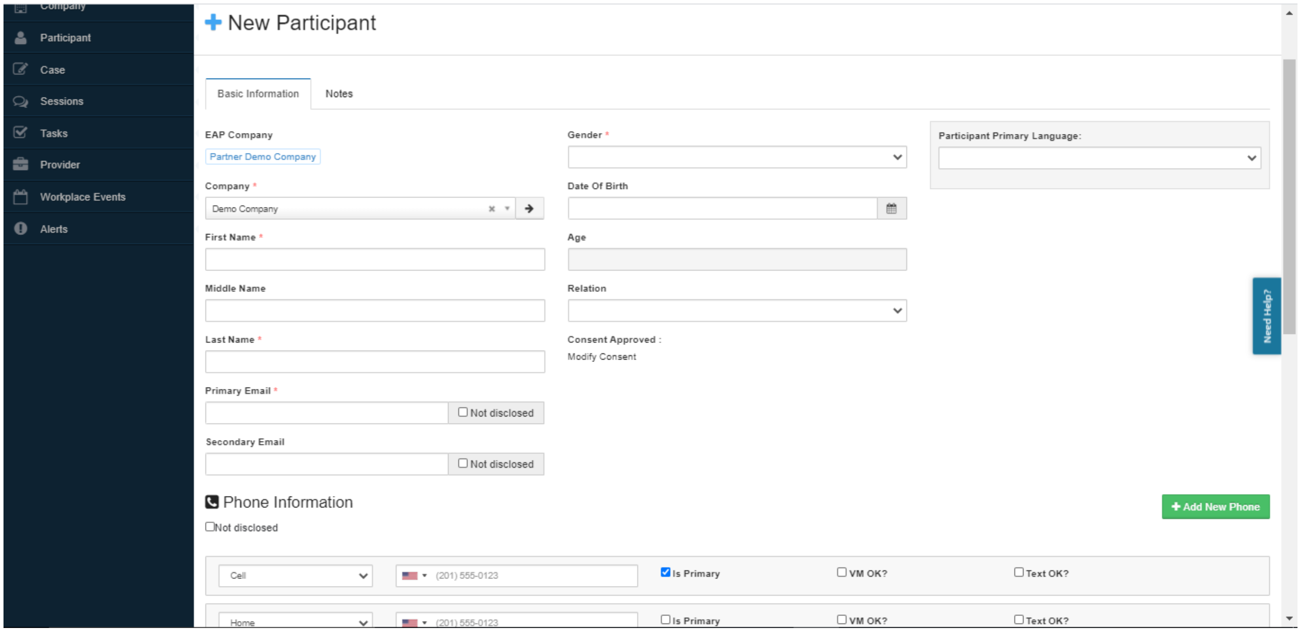
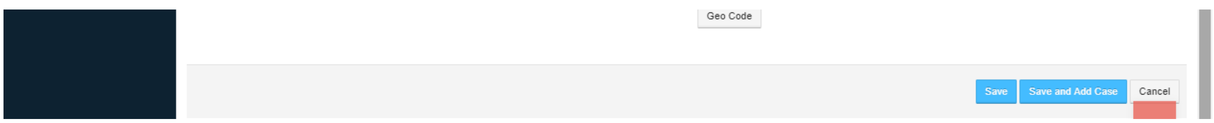
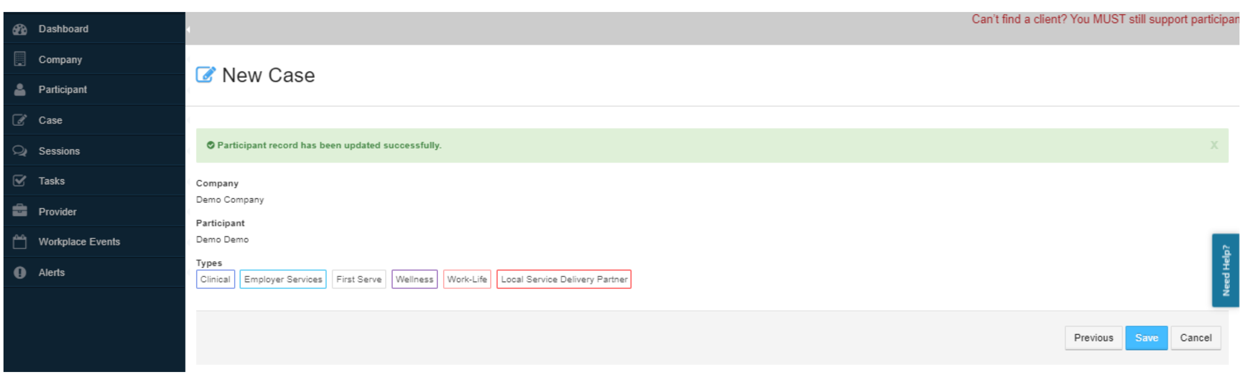


5. After filling in all of the demographic information, select "Save and Add Case" in the bottom right corner of the screen.



6. For all clinical cases, select the Case Type of "Local Service Delivery Partner". This will lead you to the appropriate questionnaire.



7. You can then select either Face to face counselling, Video Counselling, Clinical First Call Resolution (referred to as Single Session Therapy in the Clinical Policies), Manager Consultation, Structured telephonic counselling or Enhanced Services. The system will require you to make a selection here.
8. You can then select presenting issues which will populate the questionnaire related the service type and presenting issue.

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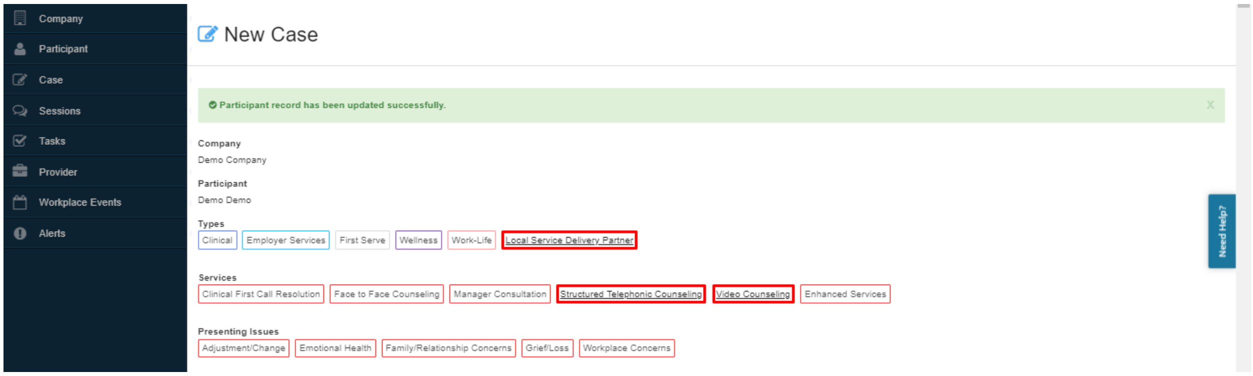
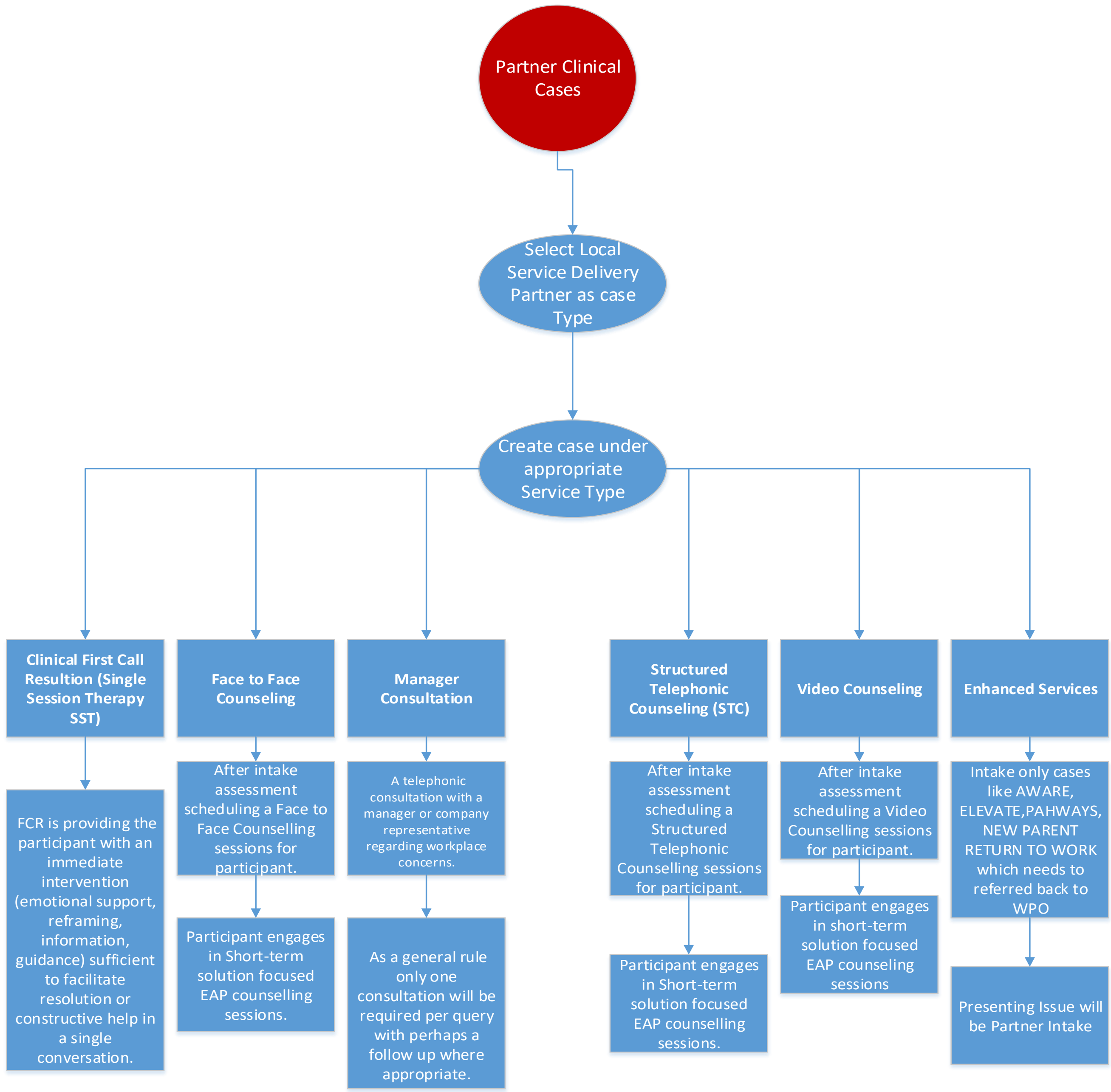


For partner clinical cases selection see below workflow to be followed:



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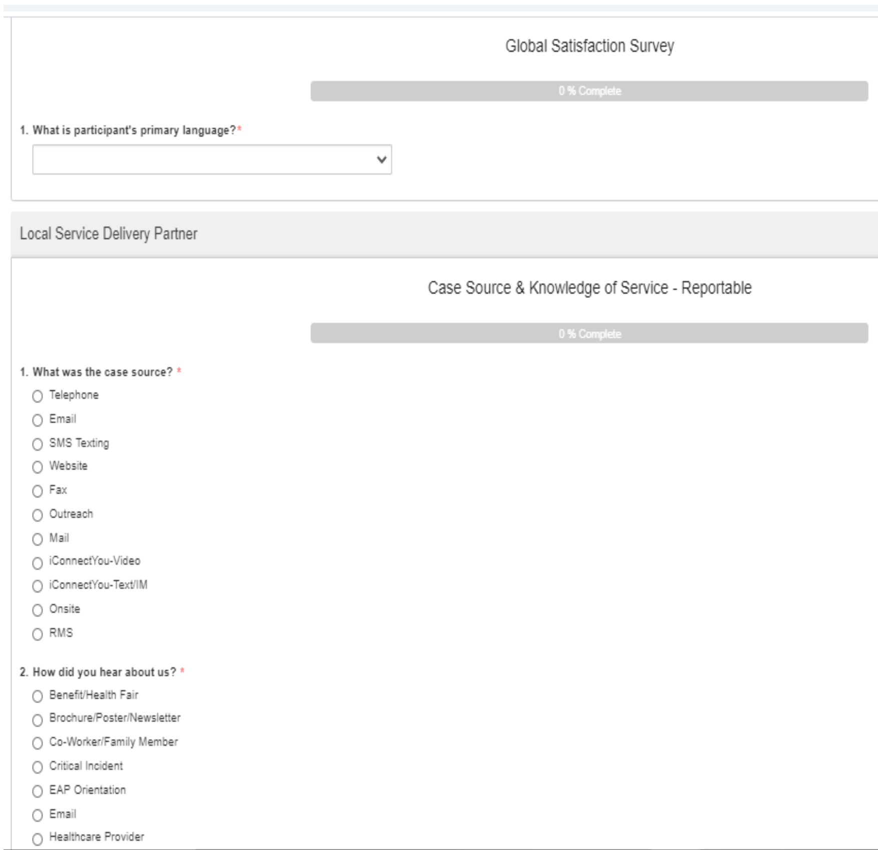
9. **Questionnaire**: Following questionnaires will be coming after you select Presenting Issue:
    - **Global Satisfaction Survey** - Survey language to be selected for correct survey link.
    - **Case Source** - Case source refers to the way the case was initiated.
    - **Local Service Delivery Partner Participant Confirmation** - This is to confirm that consent has been taken from the participant for sharing their personal demographic and identifying information within the organization, and that they have been informed about GDPR compliance. Also, to confirm type referral whether Individual or Couple or Minor.
    - **Local Service Delivery Partner** - This is where you can fill in the clinical information about the case. Most of the questions require the checking of a box , or selecting from a drop-down, but some will require free text
    - **Safety and Wellbeing Check -** For risk checks.
    - **Satisfaction Survey** - to confirm participant accepted to receive a satisfaction survey



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Local Service Delivery Partner - Pt Confirmation

0 % Complete

1. Has the partner confirmed the following with the participant?*
   - [ ] Participant Demographic Information
   - [ ] GDPR - General Data Protection Regulation
   - [ ] Confidentiality/Secure Information Storage
   - [ ] N/A - Not a partner

2. Type of Referral:*

Local Service Delivery Partner

Local Service Delivery Partners

0 % Complete

Presenting Issue

1. Main reason for participant seeking support today (Please include participant affect/presentation if applicable):

2. What emotional health symptoms is participant experiencing?
   - [ ] Anger
   - [ ] Anxiety/Panic
   - [ ] Low Mood
   - [ ] Difficulty Concentrating
   - [ ] Fluctuating Mood
   - [ ] Irritability/Agitated
   - [ ] Low Self-Esteem
   - [ ] Stress
   - [ ] Compulsive Behavior
   - [ ] Hopelessness

Local Service Delivery Partner

Safety & Well-being Check

0 % Complete

1. Is participant having any thoughts of wanting to harm themselves?*
2. Is participant having any thoughts of wanting to harm anyone else?*
3. Is participant experiencing possible substance use issues?*
4. Does participant have any concerns regarding abusive relationships?*
5. Does participant have any concerns regarding child or vulnerable adult protection?*
6. Was this a crisis call? (i.e. Was a third party contacted?)*
7. Were any of these potential areas of risk not discussed?*

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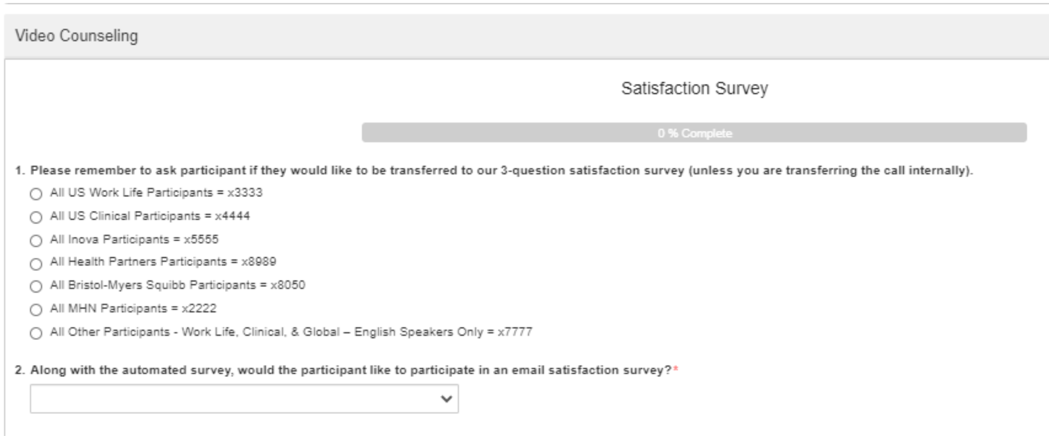
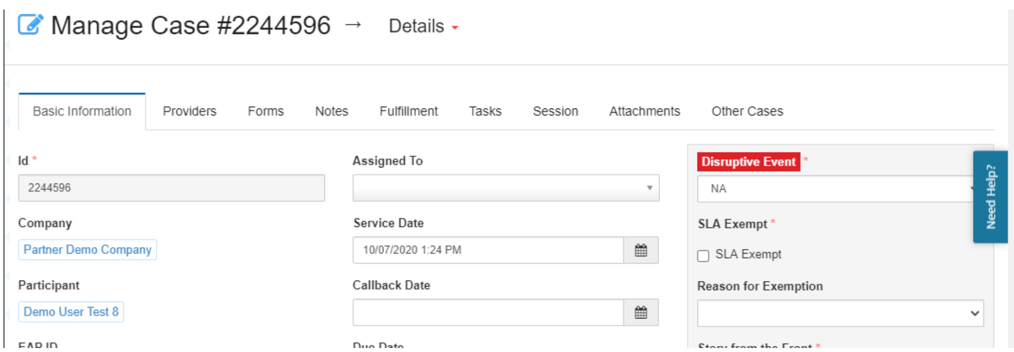
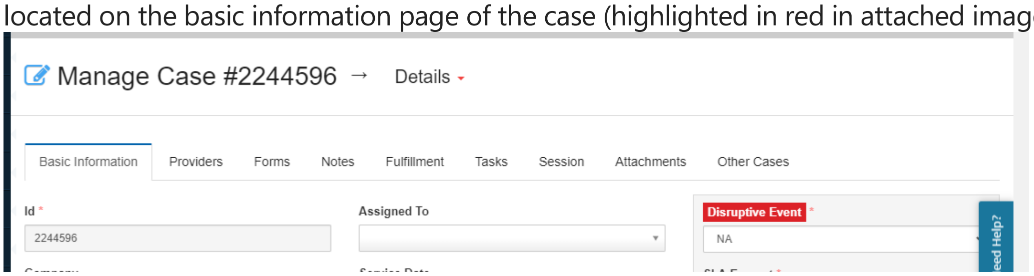


After completing the questionnaire save the case.

Kindly provide the **Service Date** of the case which will be when you have receievd the intake call from the participant on Basic Information Page shown below:



Disruptive Event: The purpose of this field is to capture when a participant has been impacted by a natural disaster, a terror attack, etc. This field will appear after each case has been created and will be located on the basic information page of the case (highlighted in red in attached image).



It is needed only used in situations where a participant has disclosed that they were impacted by this event. else mention N/A.

Creating Sessions:

To create session you need to authorize session first on Basic Info Page:

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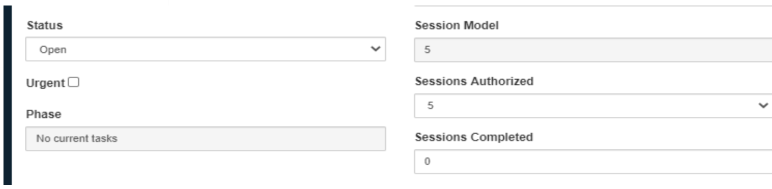
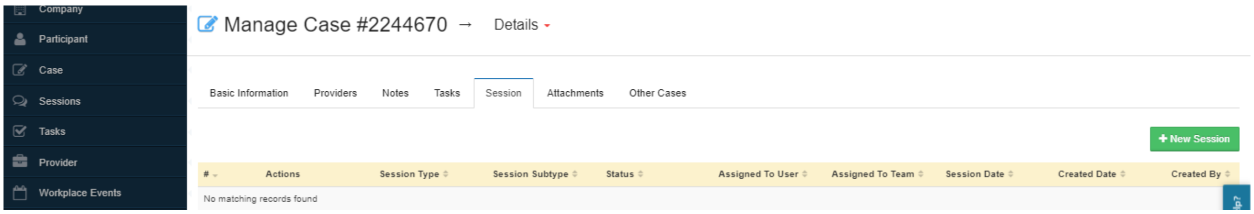
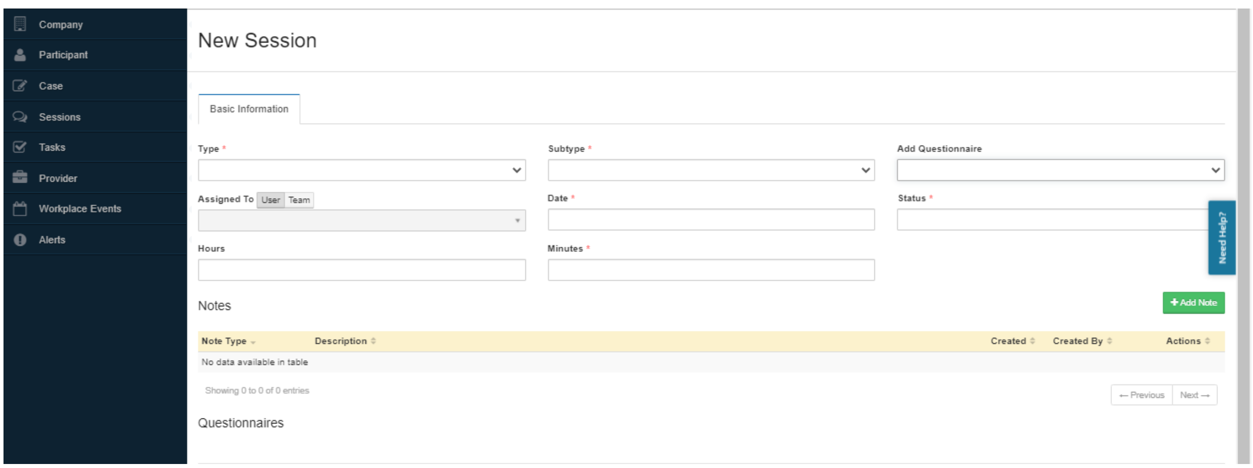
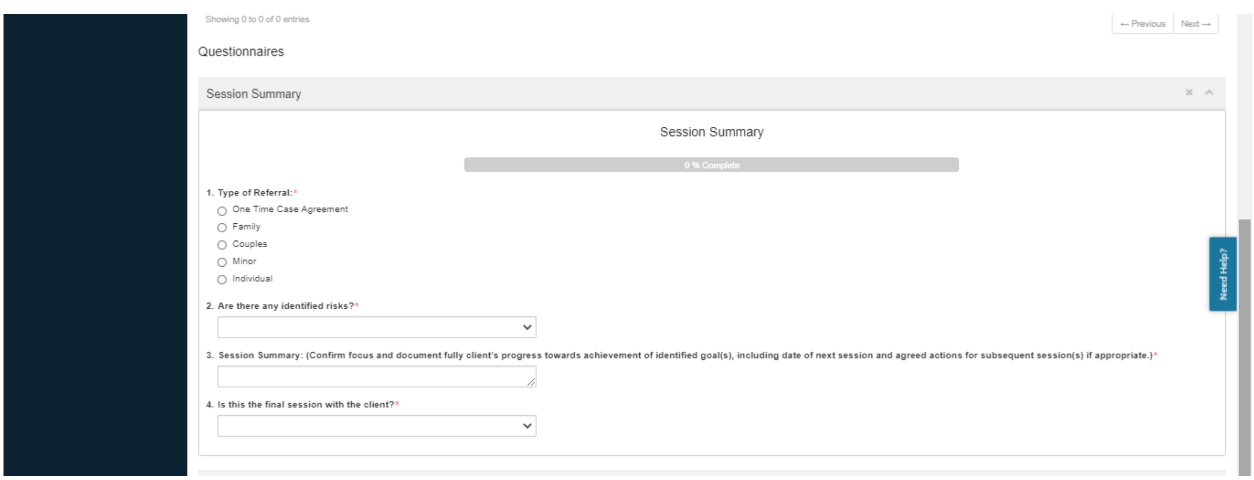


After session kindly insert the session in the session tab in case by clicking on New Session tab.



Fill the required fields and also add Questionnaire of Session summary for each session and save the session. Likewise create all the sessions participant has scheduled for a particular case.





After putting all sessions kindly update the Session Completed tab in basic Information page:

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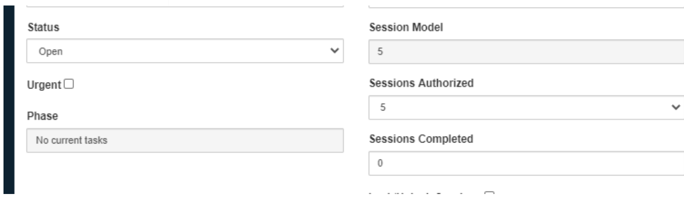
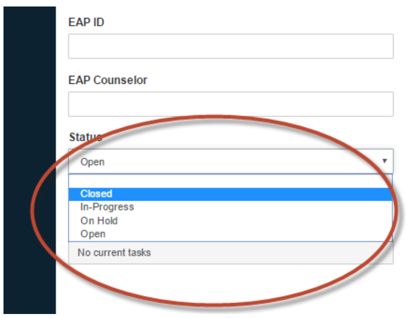
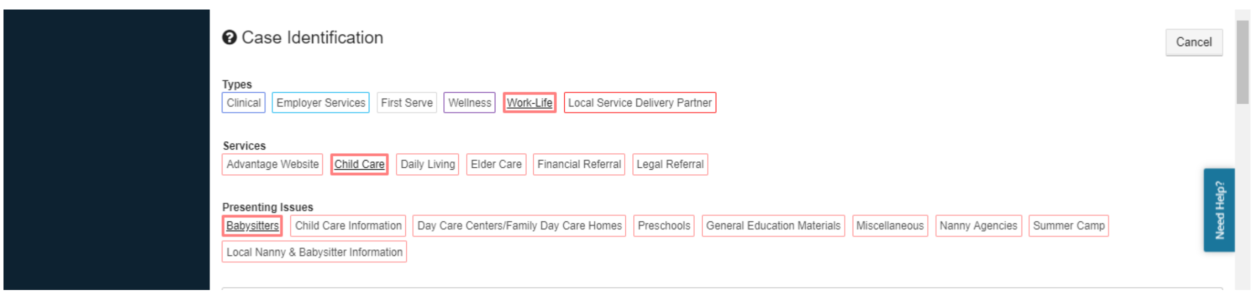


Closing the case:

After completing all the tasks kindly close the case by selecting the Status as Closed.



Creating a Worklife Case -



See below workflow for worklife cases:

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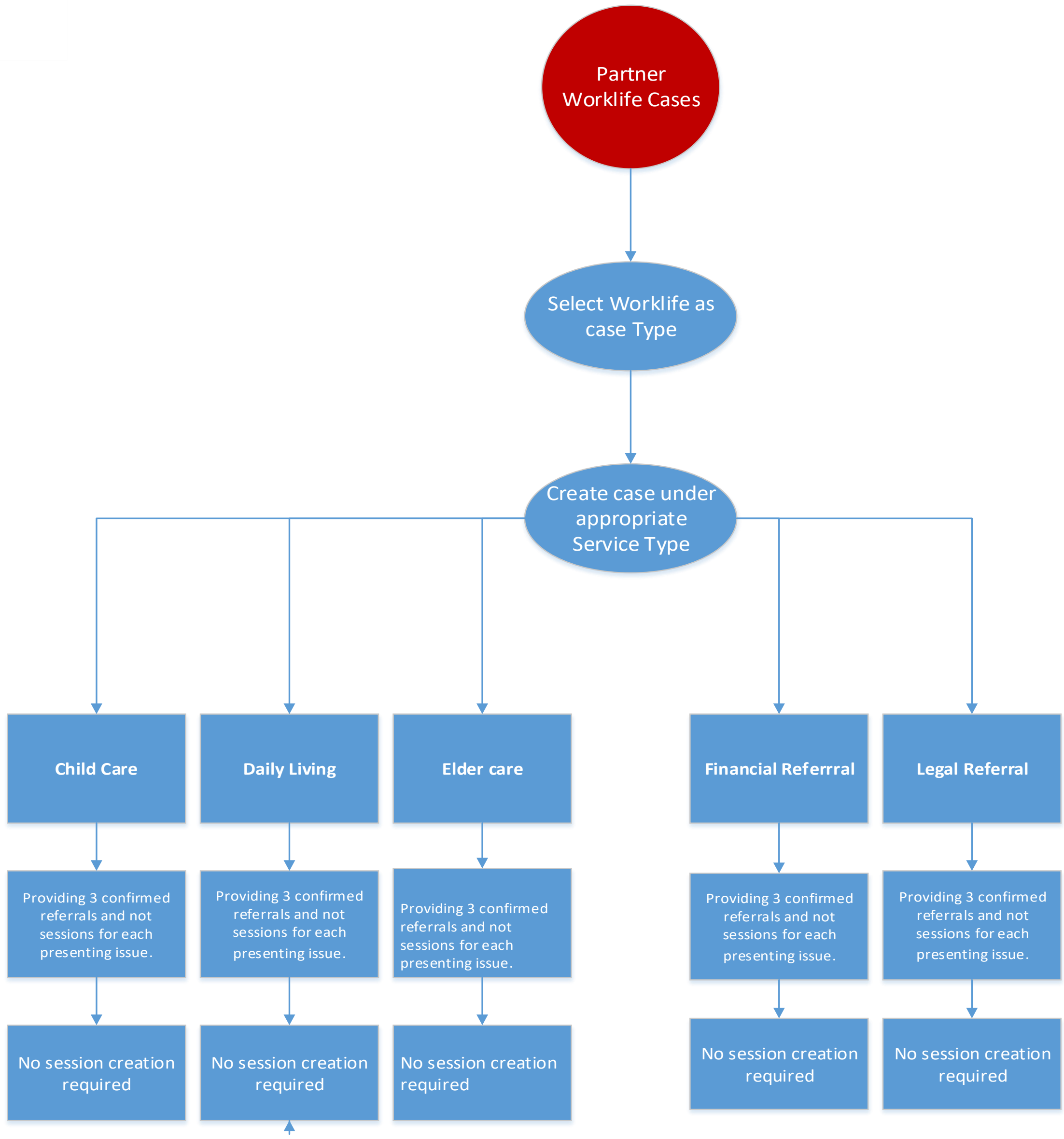

Creating Wellness Intake Cases:

Intake cases needs to be created under Wellness Case Type- Services- Then Presenting Issue should be Benefit Overview.

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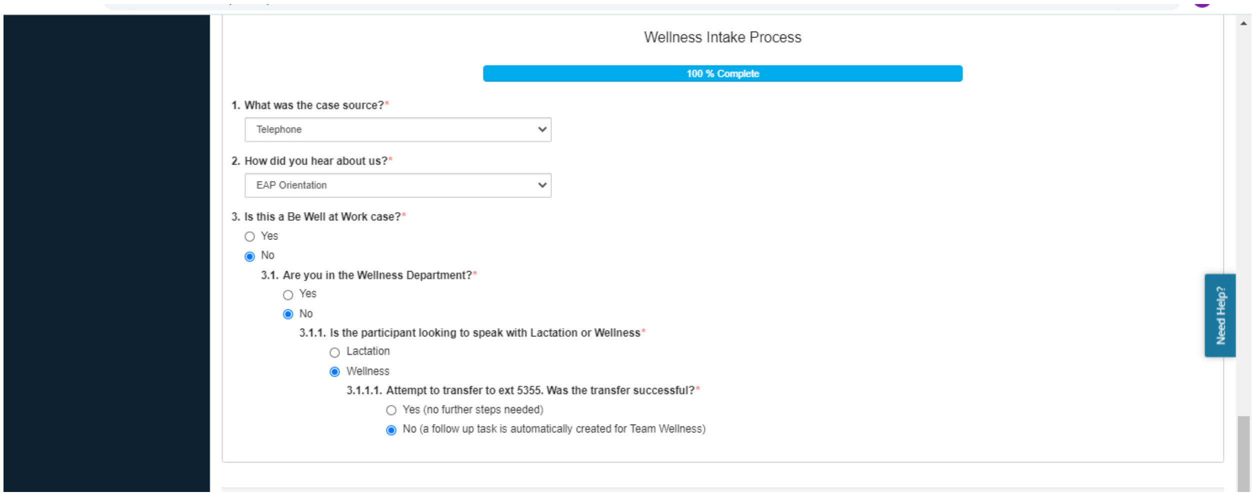
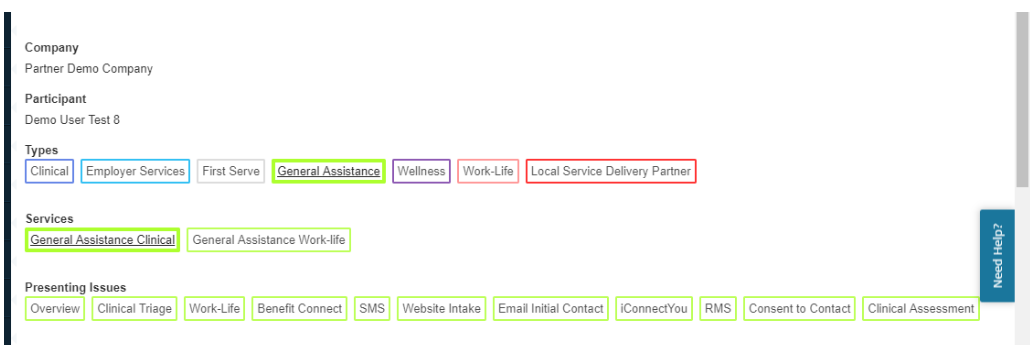
It asks whether the person creating the case is in Team Wellness. Partners should say no, and then it's going to ask if they want to speak with wellness or lactation. Selecting Wellness will then prompt to transfer to the Wellness extension, so they need to reply no as well so that the UCMS case flow assigns a follow up task to Team Wellness. It would be important for the partners to create a note on the case with the call back preferences (time, language, etc.) and the reason for request. Kindly do the intake by filling all the below questionnaire to create a follow task for our internal team:



Creating a General Assistance Case:

General Assistance is a case type available to all companies that receive Clinical or Work-Life services, and this case type is used for creating a case for a participant who calls for any enquiry and for whom you did not provide any services. If it is Clinical enquiry select General Assistance- Clinical else for Worklife select General Assistance Worklife.



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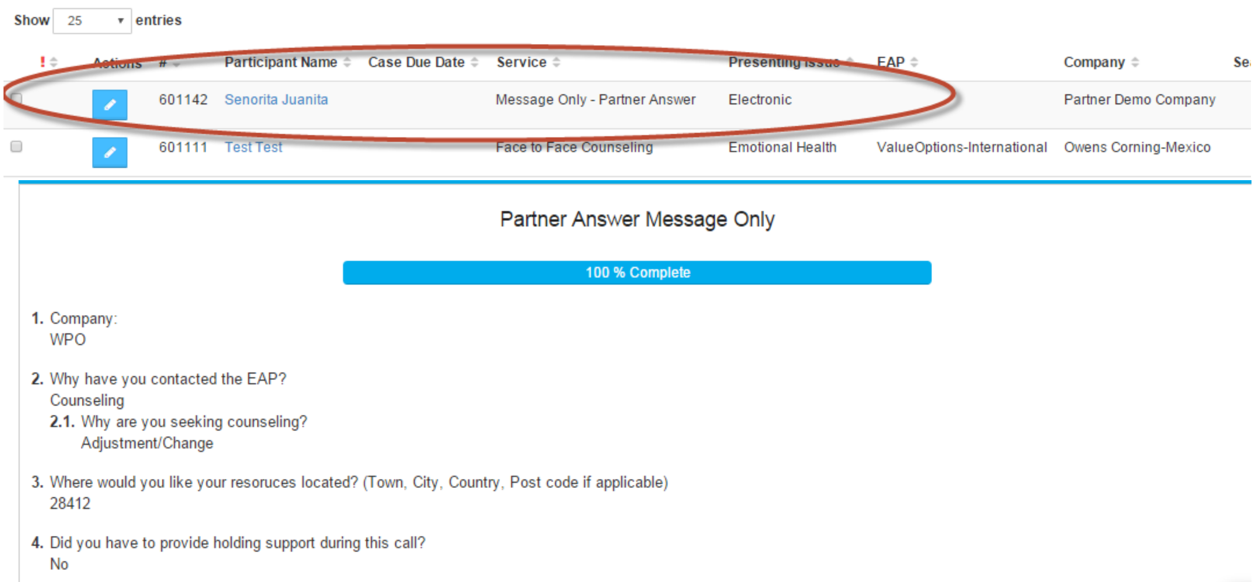
Creating a Message Only Partner Answer Cases:

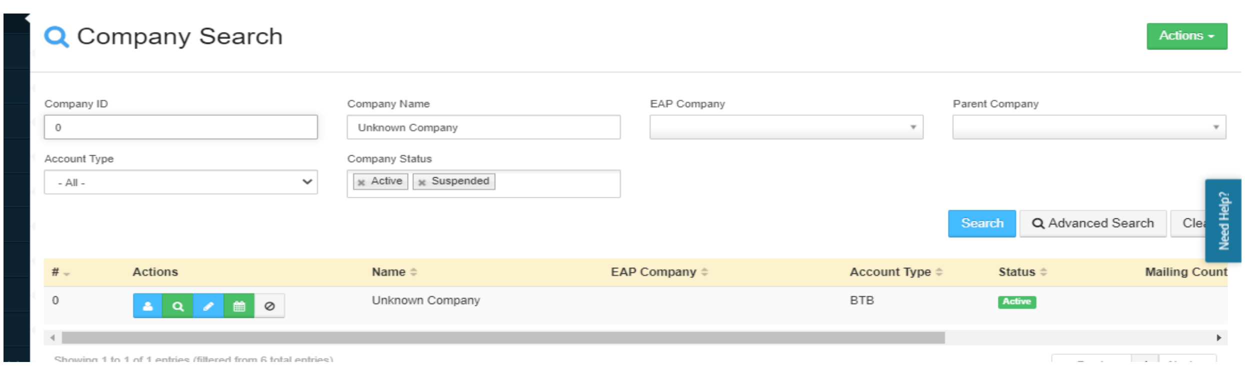
All cases coming through website, iConnectYou or SMS cases will be created by WPO internal team and assigned to you as Message Only Partner Answer.



Kindly open this case and always close the "message taking" case from the WPO team member. After closing the case select the participant and create new case for the participant.

Case creation for Unknown Company

For callers from a company which is not a WPO client, please provide them support under our First Serve policy and create the case under Unknown Company:



Create the participant by entering the Company Name and participant demographic information:

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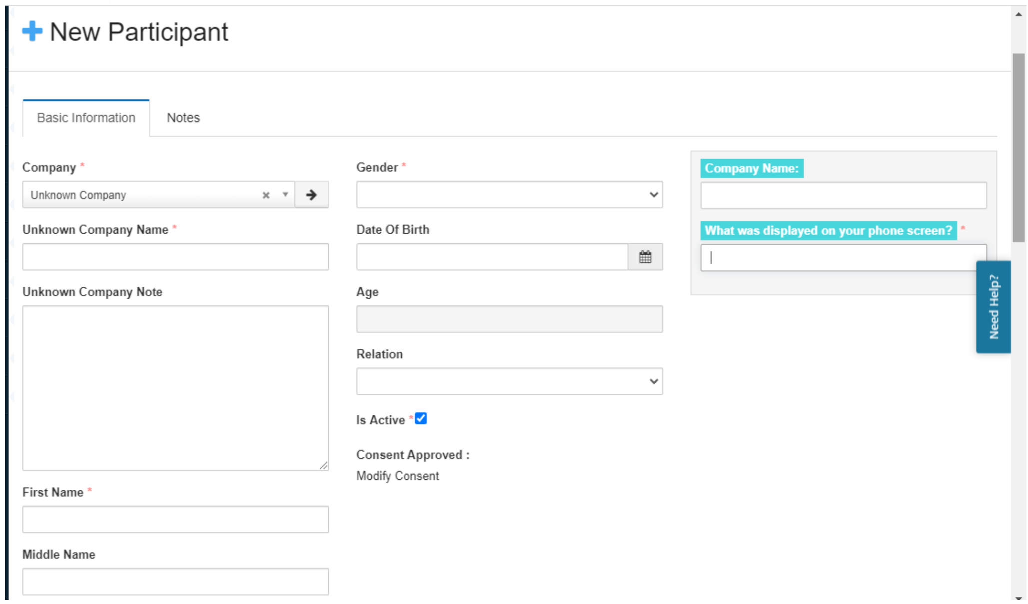

After saving the participant details kindly create cases under First Serve or General Asssitance.

General Assistance- If it's a General Enquiry about EAP services whether Clinical or Worklife.

First Serve - Participants who are clearly ineligible for the service (for example they have found the number for the EAP on a community website without being a member of that community) can be offered support under First Serve. The following are First Serve Clinical Services: First Call Resolution, Structured Telephone or Video Counselling (up to 3 sessions),

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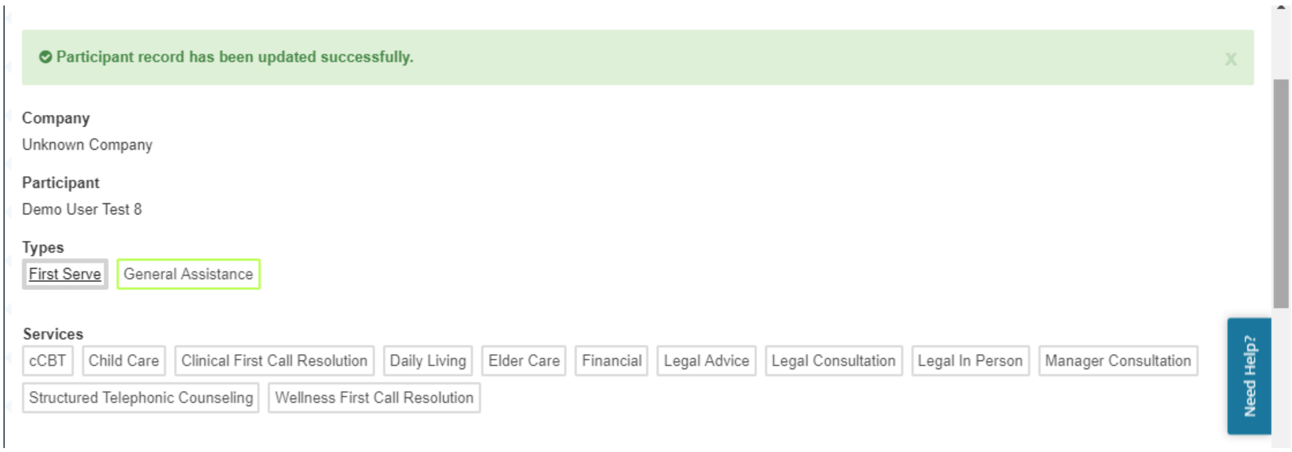
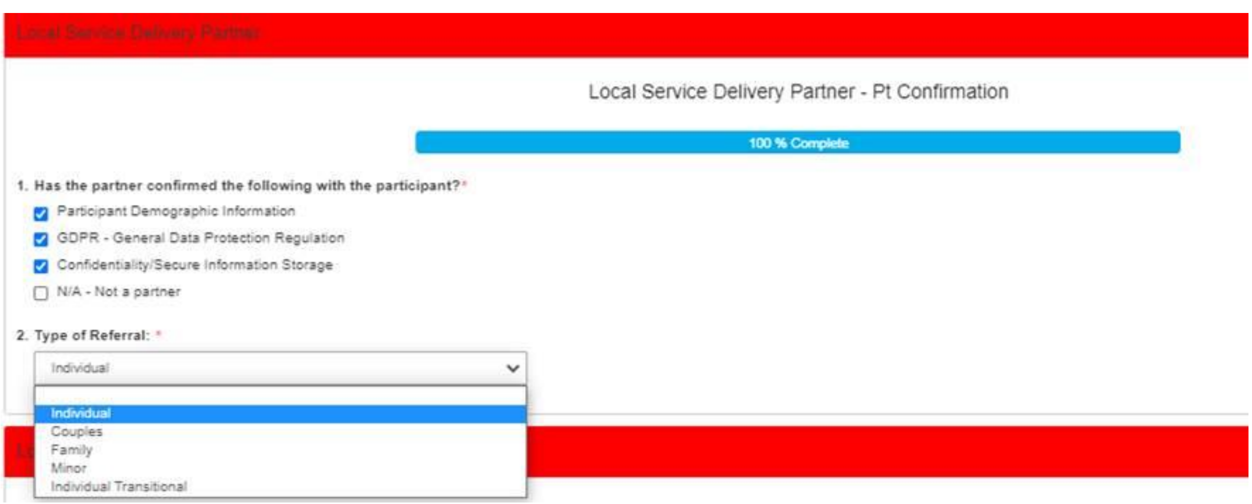


- **Creating Transitional Support Cases:**

Case creation will be same as Clinical cases under Local Service Delivery Partner and select Service Type and presenting issue as per the participant.

Then kindly select in Type of Referral **Individual Transitional** for transitional support. See below:



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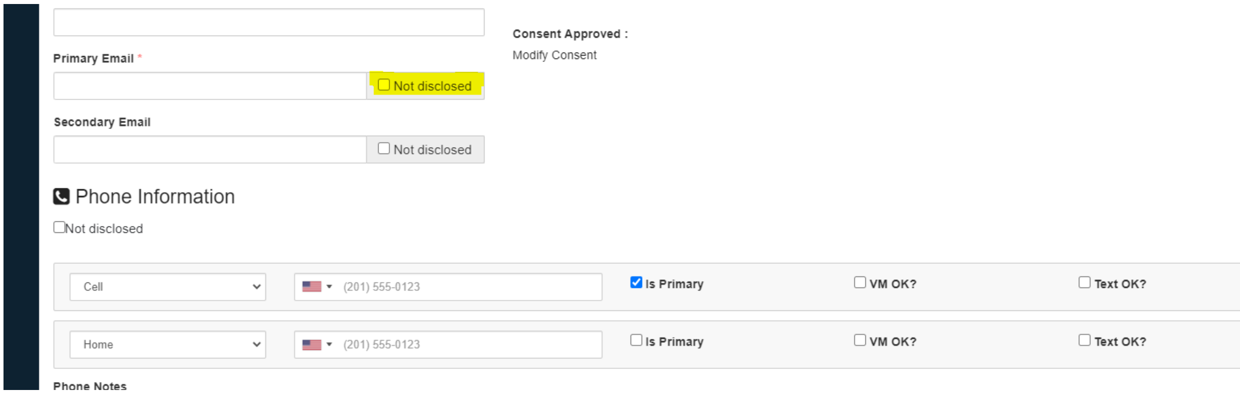
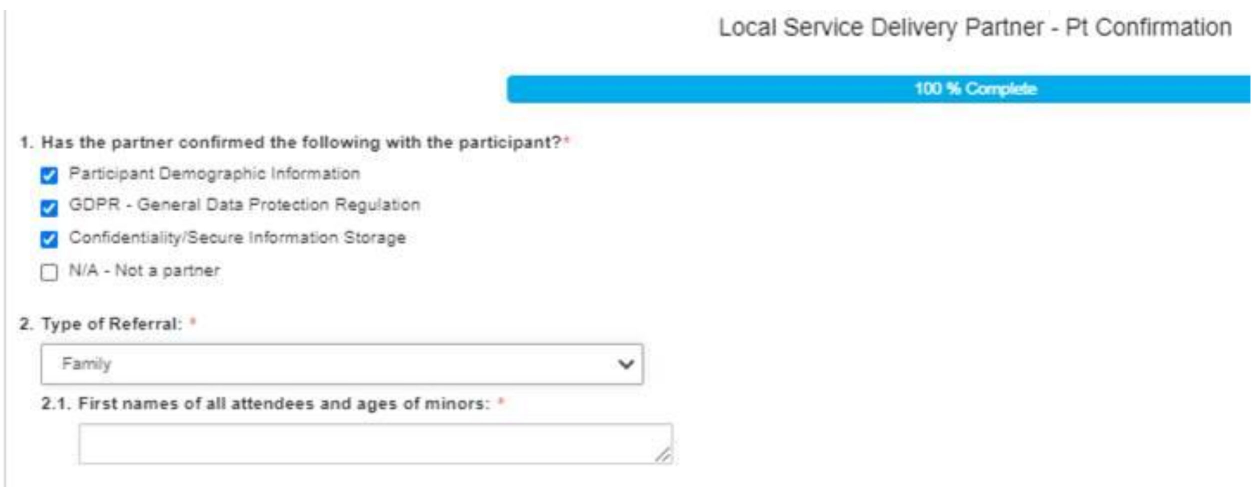
- **Creating participants without Email address and Phone Number:**
  When participants don't provide the email address or phone number kindly select Non Disclosed shown below:



- **Creating cases for Couples Counselling and Family Counselling:**
  Case creation will be same as Clinical cases under Local Service Delivery Partner and select Service Type and presenting issue as per the participant. Then in Pt. Confirmation select family or Couple shown below:



Creating PATHWAYS cases in UCMS:

If you anticipate upfront this client will need an open term support approach, please do create the case as a Local Service delivery partner - Pathways case from the start, instead of creating a regular short-term support and then transition to pathways at the end of the sessions. That would allow upfront for the goal determined to be a realistic long term support one.

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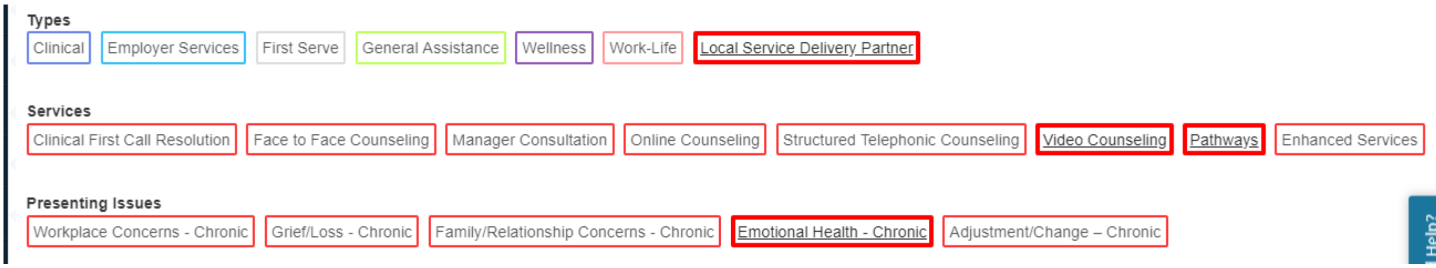
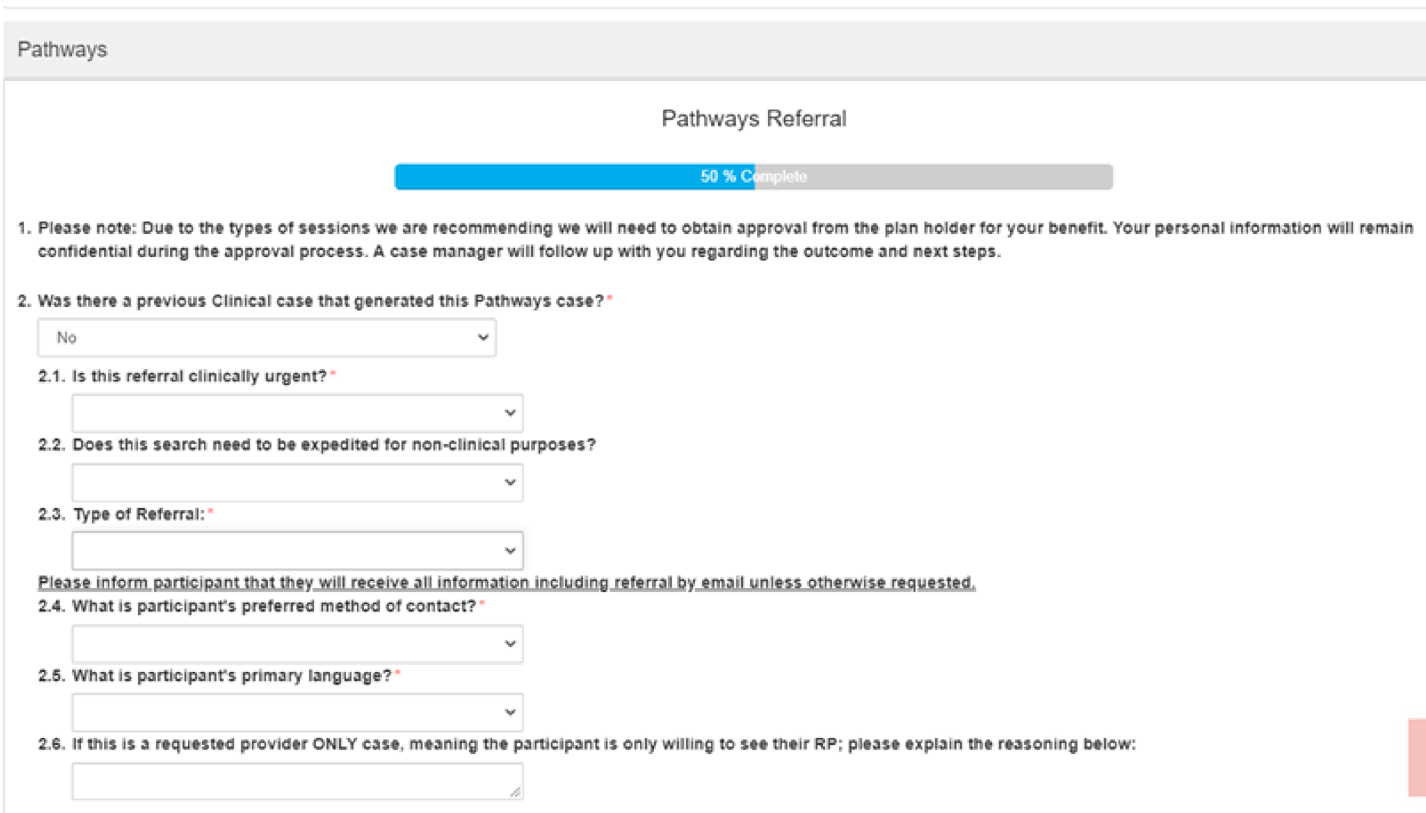
The Pathways case and questionnaire is a bit different than the regular cases, it requires more information. Please see an example of what you will need to select:



If you are creating a Pathways case from start, meaning the client did not had a previous short-term case, you will be selecting "No" to the question "2.Was there a previous Clinical case that generated this Pathways case?" and that will make additional questions to popup.



I do want to bring your attention to the fact the questionnaire mentioning that you should only be authorizing 1 session in such cases. This happens because as soon as you create a case we will be receiving a notification to review your clinical rational and also to connect with the Account manager and have their approval to proceed with the Pathways case. This is a way to ensure correct expectations are set with the client, and that we don't tell them that they will be having open term support without having the confirmation from the AM that the case was indeed approved.

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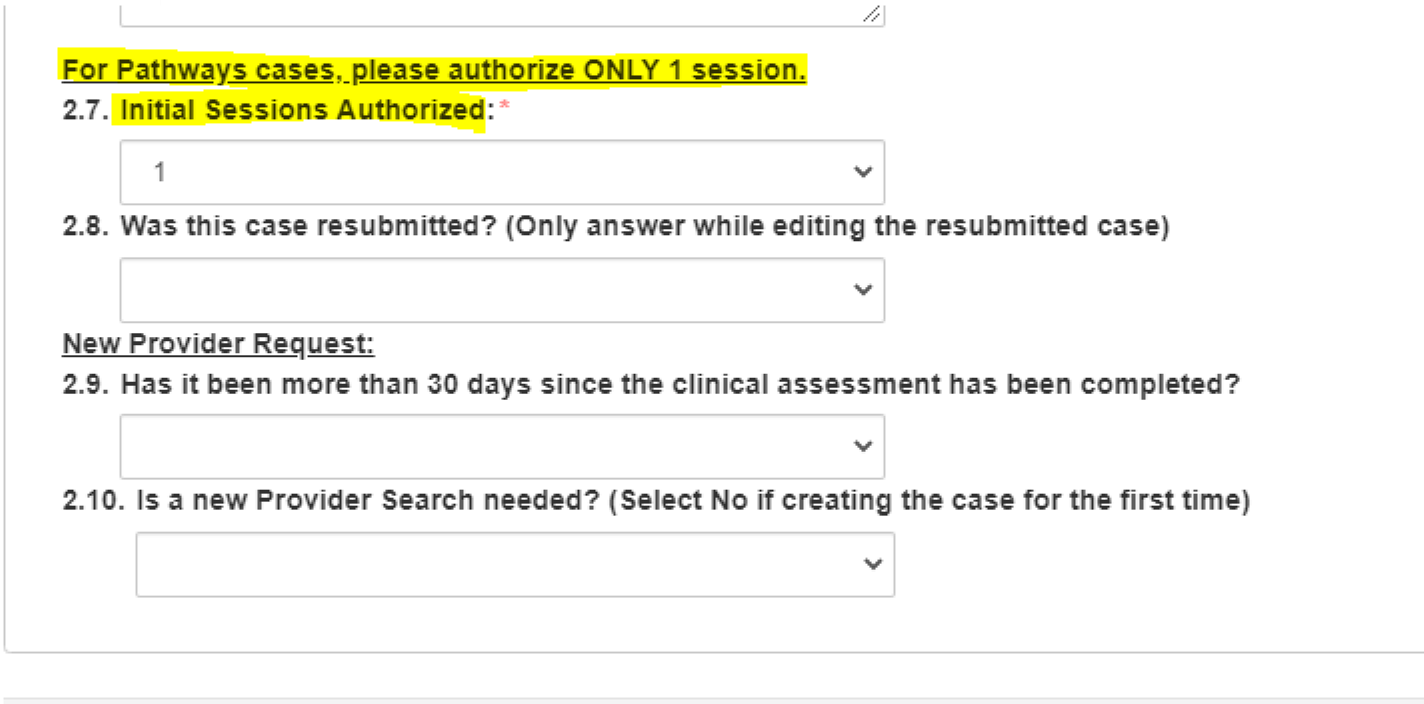
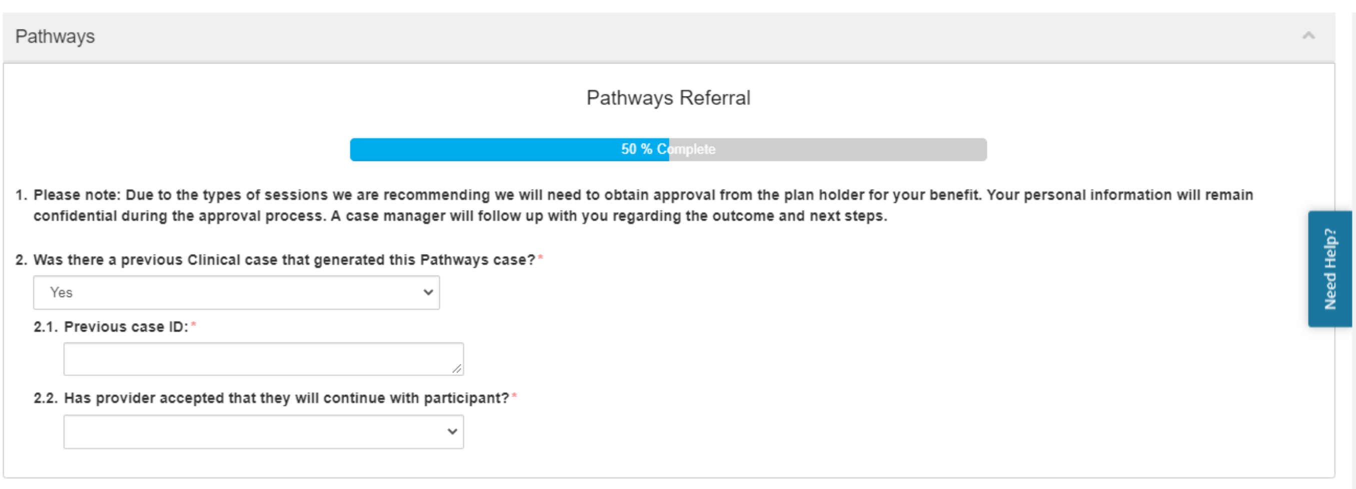


Clinically we will also be reviewing the progress of the Pathways case every 6 months, to have an idea of how it's going, how many sessions occurred so far and if additional support might be needed.

Just a heads up regarding a second scenario, that would be a case where someone had a short-term case, with an established short-term goal, and something occurred during that process that made the client need long-term support. By the time you reach the end of the session model, you can still create a Pathways case and that case will be connected to the short-term one. See below:



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- **Adding attachments to cases:**
  To add any attachment to a case kindly click on Attachment tab and then click on +New Attachment button to add shown below: