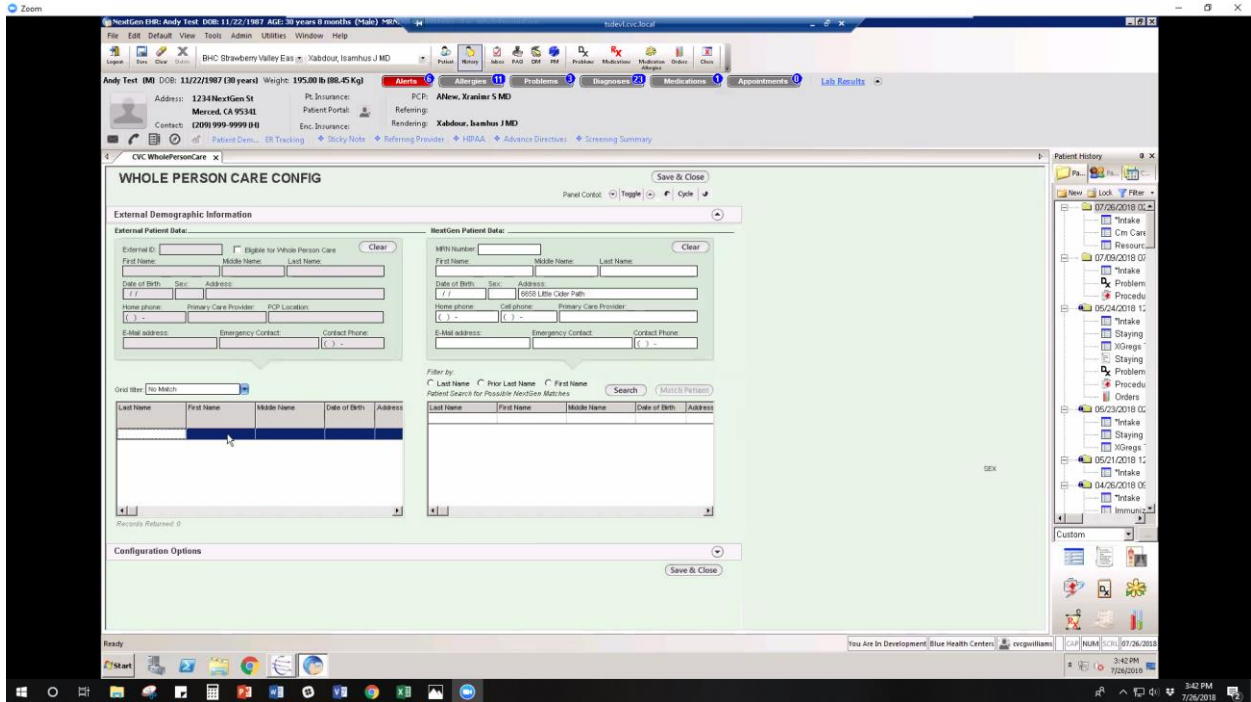# WPC Template User Guide

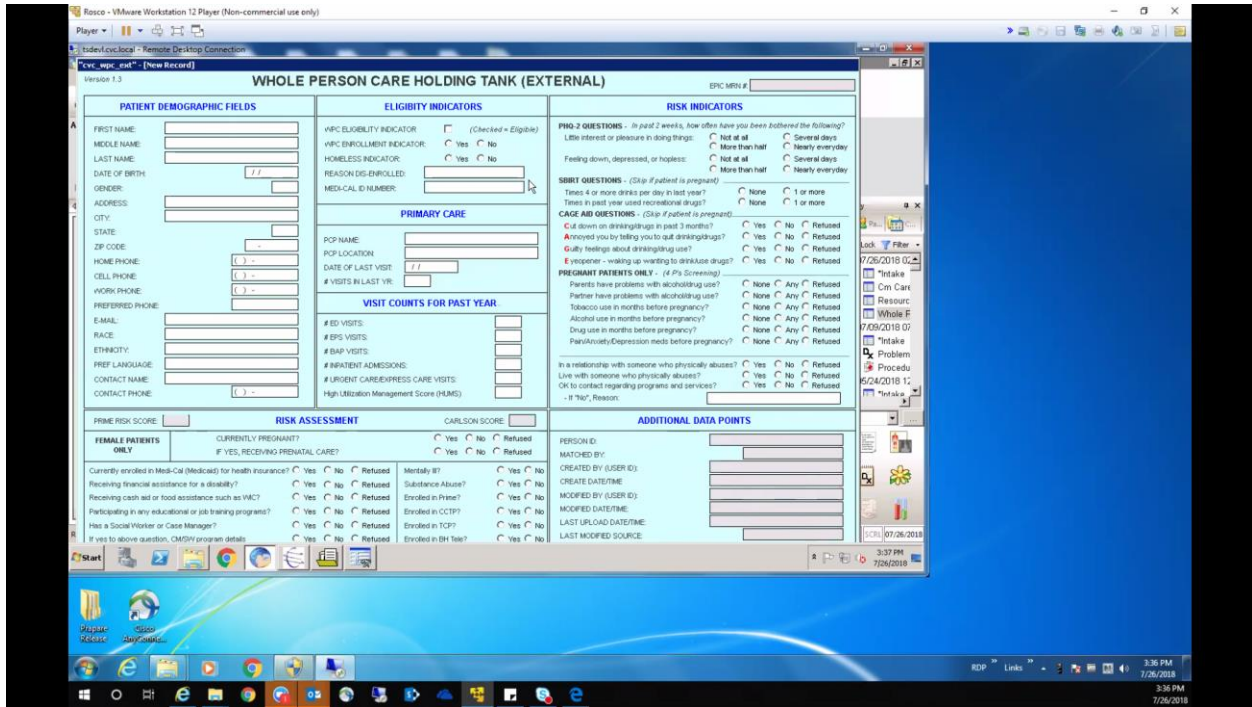## Initiating Patient Matches

Patient Matches
Note: Match patient button will be greyed out until you enter patient information that you want to match.
Template will receive data from county.
Steps
1) Input the patient's information.
2) Manually confirm the changes.

Introduction to the Holding Tank

Purpose of Holding Tank: Once the user matches the WPC patient and they exist the holding tank will flow to match the data to the patient's medical record.

Steps: Review the data in the holding tank.
1) Review the patient's data.
2) Manually accept the data.

If the patient doesn't match, then the patient is not your patient.

WPC Template User Guide
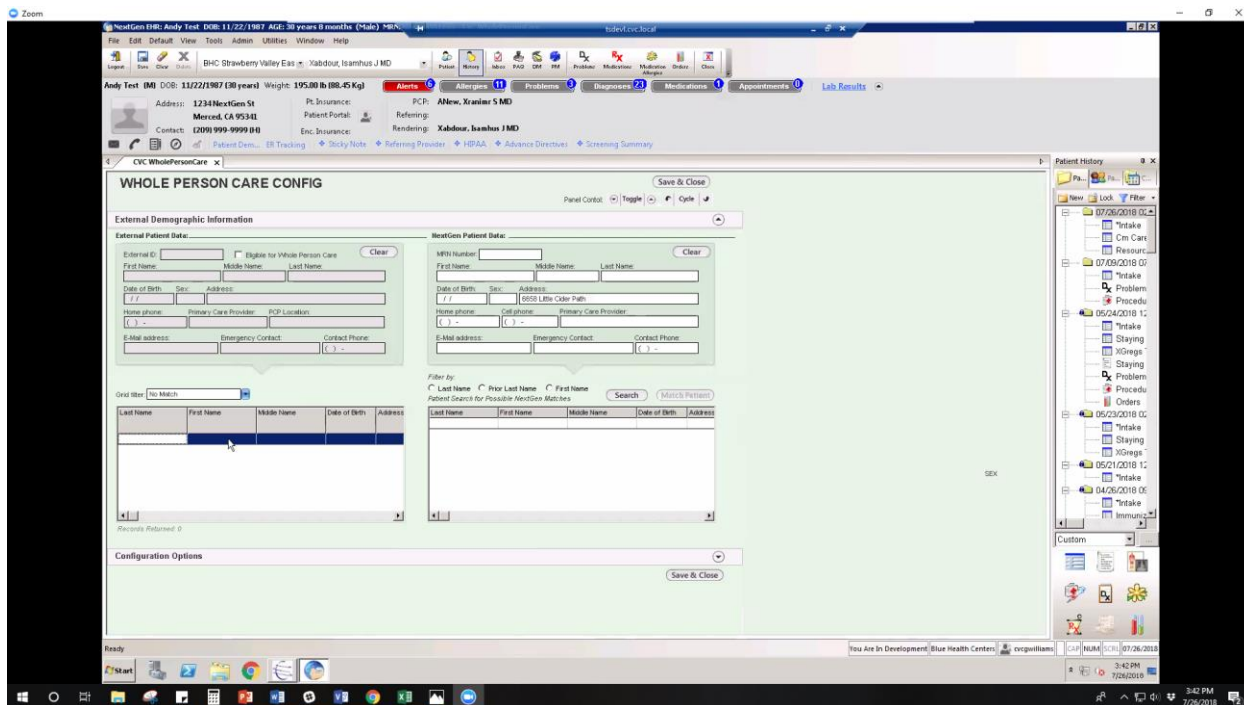
Matching the WPC patient with their Patient Information in Next Gen

Required Next Gen Version: 5.9/8.4 KBM
Notes: Currently there are no software options that can connect to the WPC template besides Next Gen.

Steps: Match the NextGen patient with the Whole Person Care patient.
1) Click the "search" button next to "match" button.
2) Clear all the fields.
3) Input information into the search criteria, such as the address.
4) Search by last name, and review the date of birth.
5) Choose the patient that you want to match. Patients with an external ID have been match already.
6) Verify that the patient's address on the WPC template and the Next Gen window match each other. Resolve discrepancies in the patient's contact information and addresses by modifying the patients via File > Modifying Patient.

Steps: Unmatch the Patient.
1) Go into the patient's demographics.
2) There is no direct "unmatch patient" option. Delete the external ID to unmatch patient in the workflow within the WPC template.

WPC Template User Guide
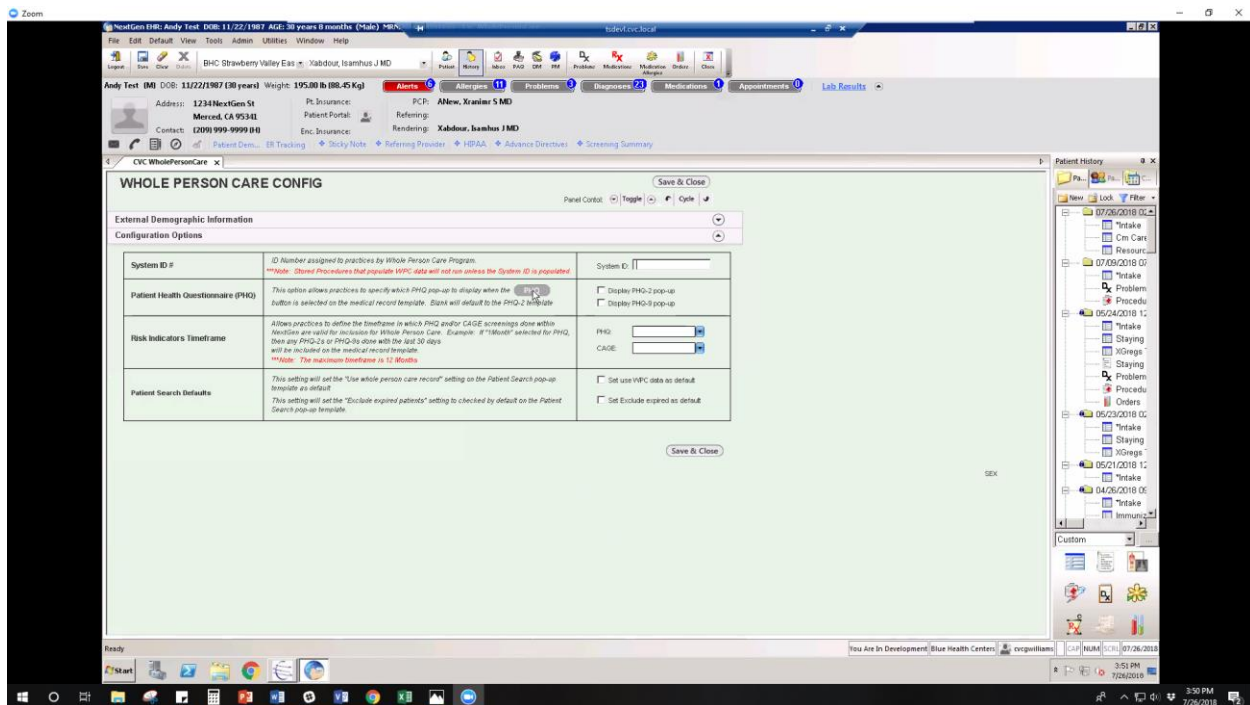
Reviewing Patients and Removing Expired Patients

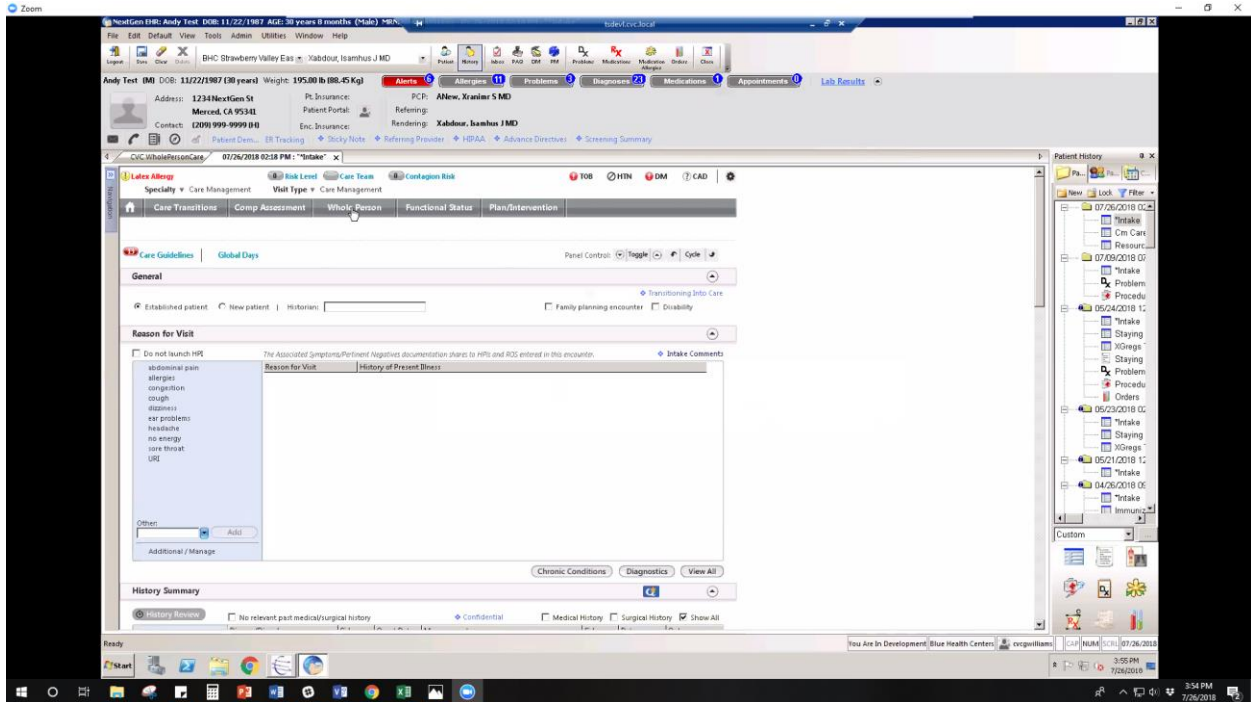**Required Information:** System ID is assigned by HHS, PHQ-2 and PHQ-9.

Note: Some reports require PHQ-9, but some practices PHQ-2.
If the clinic wants PHQ done for 12 months, then the screening needs to be redone to specify the cage screening.

Steps
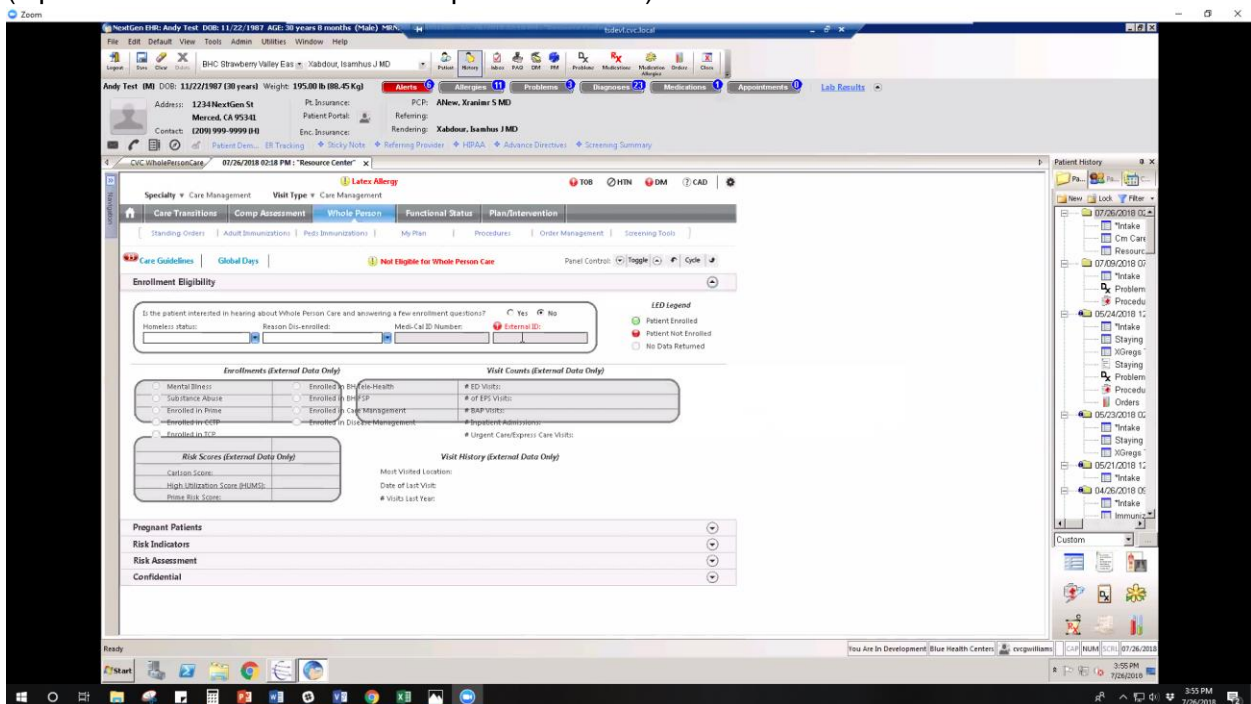1) Check the patients by default.
2) Remove expired patients.

WPC Template User Guide

Medical Record Template

Steps
1) Select case management.
2) Select speciality and visit type as a foundation template to pop up medical record template.
(Optional: Set foundation as a template workflow.)

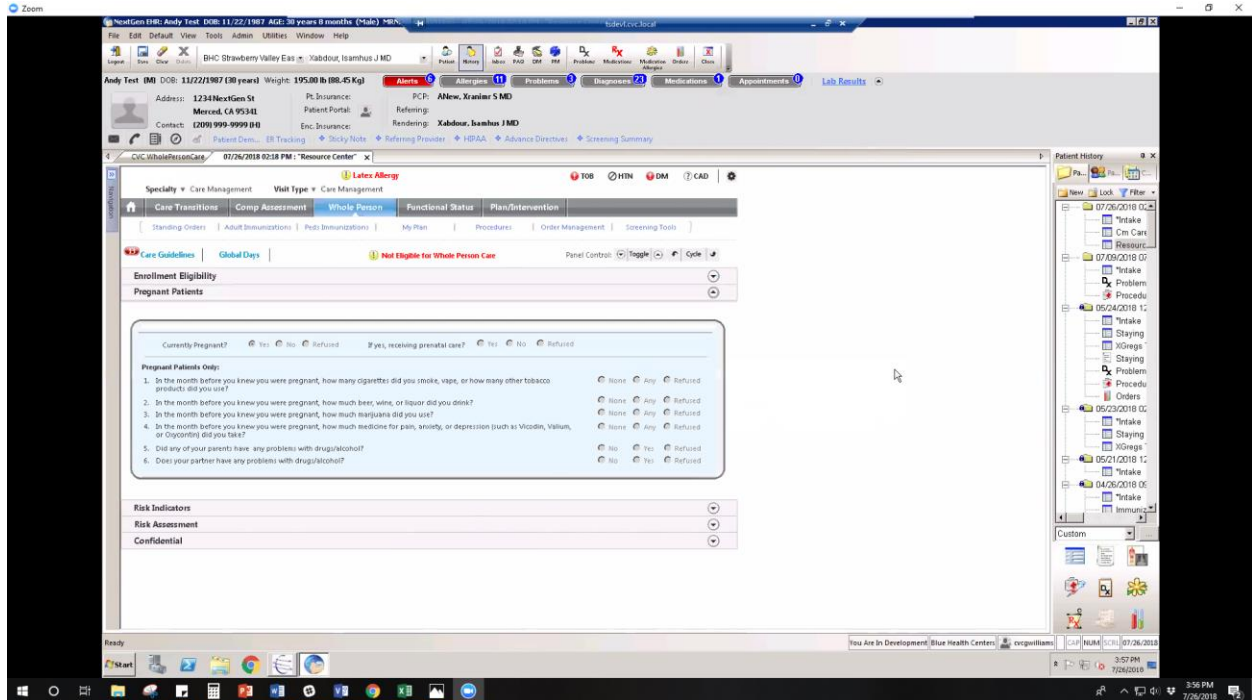## Verifying the Patient's Existence and Reviewing WPC Scores
Note: If the county lacks an IT team, then the HUMS score would not be updated.

WPC Template User Guide

Steps

1) See if the patent exists.

2) Check Carlson score, utilization scores, and ED visits in the first panel, and check the HUMS score.


Checking Record for Pregnant Patients

Note: For pregnant patients, for male will be read only.

SBIRT and CAGE sections apply to pregnant patients. If the configuration setting had not been selected, then it's PHQ-9 by default.

PHQ has to be edited from the template.

Steps

1) To define which pop-up is displayed in the configuration settings, click the PHQ button.

2) Modify configuration settings in the window.

3) Exit out of the PHQ window.

3) View the patient's PHQ history in the "PHQ 2 Questions" section.

4) In the "CAGE Questions" view the date of when the last PHQ history had been performed.

Click the "Add" information to include new information.

WPC Template User Guide
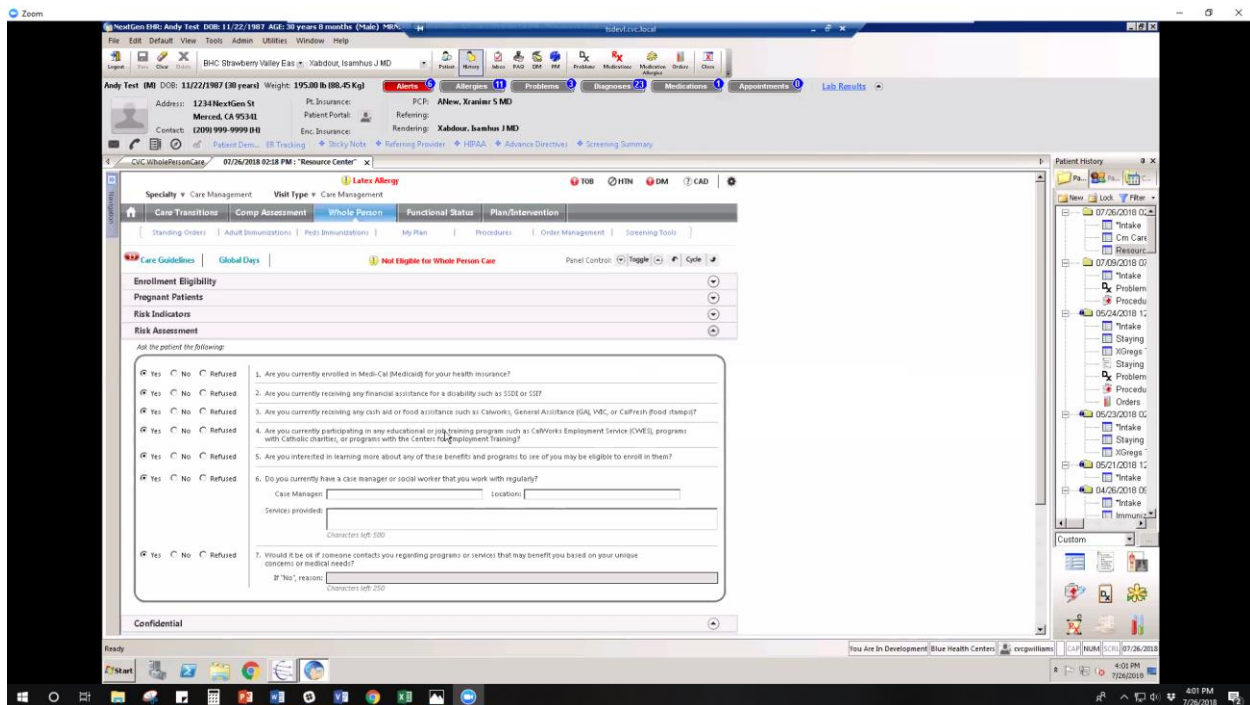
Filling Out the Patient's History of Incarceration, Domestic Abuse, and Mental Health Provider's Information

Steps

1) Fill out questions regarding the patient's incarceration history, history related to domestic violence, and their mental health provider's contact information.

2) Manually look into the patient's chronic medical conditions in Next Gen. The WPC template does not include their chronic medical conditions.