

**Watson™ Care Manager**  
**March 2023 documentation updates**

## Note

Before using this information and the product it supports, read the information in [Notices \(on page dcccxcviii\)](#)

# Edition

This edition applies to Watson™ Care Manager.

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# Chapter 1. Configuring

As an administrator, you must configure all of the items and settings that are required for your organization's programs, care plans, data capture, care teams, and work items for care managers and supervisors.

## Configuring programs

You can configure a library of programs for use in care plans. A program is a care delivery strategy that is designed to deliver a specific client outcome.

### Related information

[Default non-configurable client data types in Watson Care Manager \(on page 152\)](#)

## Creating programs

You can create a program and define the structure and content of the program, which consists of modules, assessments, and questionnaires. You can specify whether program graduation applies to the program.

As you create programs, you can configure a program graduation option to enable the care team to graduate individuals from programs when they complete certain parts of the program. Program graduation does not necessarily coincide with an individual completing the entire program. Individuals can graduate from a program when their participation in the program is complete, even if that occurs before the care team finalize their actions and tasks to complete the program.

You can associate an external system reference with a program that you are creating so that incoming program data from an external API can be mapped to the configured program in Watson Care Manager.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Programs**.  
The list of programs is displayed.
3. Click **New** to create a program.  
The **New Program** page is displayed.
4. Enter a name for the program, and a description.
5. In the **External System Reference** field, enter a unique reference number of up to 20 alphanumeric characters.  
When sending a program as an API attribute, the external system identifies the program by its external system reference.

6. Select **Graduation Applies** to indicate that a client can graduate from the program when the client's participation is complete.
7. Click **Save**.
8. Select the program in the list of programs.  
The program home page opens.
9. Select the **Content** tab, and add program content by completing the following steps.
  - a. Click **New Module** and enter a name and description for the new module.
  - b. Click **Add Content** in the **Actions** menu of the module.
  - c. Select some content to add to the module, such as assessments and questionnaires.
10. To reorder the sequence of modules, or questionnaires or assessments in a module, do one of the following steps:
  - Click **Reorder** to reorder the sequence of modules in a program. In the **Reorder Modules** page, drag and drop modules to position them in your preferred order.
  - Click **Reorder** in the **Actions** menu of any module. In the **Reorder Module Content** page, drag and drop content items to position them in your preferred order.

This action is not available if no content or only one content item is associated with the module.

## Generating goal suggestions from programs

You can configure goal suggestions to be automatically added to a program in a client's care plan.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Programs**.  
The list of programs is displayed.
3. Select a program.  
The program home page opens.
4. Select the **Suggestions** tab, and add goal suggestions by completing the following steps.
  - a. Click **Recommend Goal** and search for and select a goal to suggest from a predefined list of goals.
  - b. Select **Automatically Add** to cause the goal to be automatically added to the program.
  - c. Enter a reason for the goal.
5. Click **Save**.

## Generating tasks from programs

You can configure tasks to be automatically created based on any program status. Tasks are added to the appropriate task lists when the program is set to that status for the client.

Tasks are not added for existing clients where programs are already in the status. If you want new tasks to be applied to existing clients, you must complete the program and enroll the client again.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Programs**.

The list of programs is displayed.

3. Select a program.

The program home page opens.

4. Select the **Tasks** tab, and trigger tasks to be created based on program status by completing the following steps.

- a. Click **Add**.

- b. Search for and select a task.

- c. Set the task to be created as open or closed. For example, the task **Request client to start program** can be closed as a result of enrolling a client in a program. By default, tasks are created as open.

- d. Select a program status to trigger the creation of the task:

- Assigned
- Pending
- Enrolled
- Completed
- Disenrolled
- Not Enrolled

- e. From the list of available care team roles, select a role to assign the task to. Only care team roles that are currently assigned to users are available to choose. Tasks are added to the unassigned list for users with that care team role who can accept and complete the task.

- f. Click **Add**.

You can remove a task by clicking the **Actions** menu of the task, and selecting **Remove**.

---

#### Related information

Program lifecycle (*on page* 

## Modifying programs

You can update the name and description of a program, and revise the structure and content of the program, which consists of modules, assessments, and questionnaires. You can specify whether program graduation applies to the program.

For updated modules, assessments, and questionnaires to become available in the guided flow for existing clients, a care team member must complete the program and assign it to the client again. The progress through the program is maintained, any assessments and questionnaires that were run in the previous version are preserved.

As you create programs, you can configure a program graduation option to enable the care team to graduate individuals from programs when they complete certain parts of the program. Program graduation does not necessarily coincide with an individual completing the entire program. Individuals can graduate from a program when their participation in the program is complete, even if that occurs before the care team finalize their actions and tasks to complete the program.

You can associate an external system reference with a program that you are creating so that incoming program data from an external API can be mapped to the configured program in Watson™ Care Manager.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Programs**.

The list of programs is displayed.

3. Select a program.

The program home page opens.

4. To modify the program details, click **Edit**.

- a. Modify the name and description.

- b. In the **External System Reference** field, enter a unique reference number of up to 20 alphanumeric characters.

When sending a program as an API attribute, the external system identifies the program by its external system reference.

- c. Select **Graduation Applies** to indicate that a client can graduate from the program when the client's participation is complete.

- d. Click **Save**.

5. To modify the program content, select the **Content** tab and do one or more of the following steps:

- Click **Reorder** to reorder the sequence of modules in a program. In the **Reorder Modules** page, drag and drop modules to position them in your preferred order.
- Choose an option in the **Actions** menu of a module:
  - Click **Edit Module**, update the module name or description, and click **Save**.
  - Click **Add Content**, and select the check box of modules to add them. Click **Save**.

- Click **Reorder** to reorder the sequence of questionnaires or assessments in a module. In the **Reorder Module Content** page, drag and drop content items to position them in your preferred order.

This action is not available if no content or only one content item is associated with the module.

- Click **Delete** to delete the module.
- Expand a module and click **Remove** to remove the content item.

## Modifying goal suggestions for programs

You can update suggested goals for a program. Your changes do not affect existing clients.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Programs**.
3. Select a program.  
The list of programs is displayed.
4. To modify the suggested goals for the program, select the **Suggestions** tab.
  - a. Click **Edit** in the **Actions** menu of the suggestion.
  - b. Select or clear the **Automatically Add** option, as needed.
  - c. Modify the reason for the goal, as needed.
  - d. Delete a goal suggestion by clicking the **Actions** menu of the goal suggestion, and click **Delete**.

## Deleting programs

You can delete a program from the library. The program is no longer available for new clients. For existing clients, the program remains in the same state.

For existing clients, the program content is unaffected and any assessments or suggestions that were previously conducted are preserved. Any suggested goals or actions for that program are no longer suggested, unless they are also suggested by a different program.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Under **Care Planning**, click **Programs**.  
The programs library is displayed.
3. Select the **Actions** menu of the program that you want to delete, and click **Delete**.
4. Click **Yes** to confirm.

## Configuring program closure settings

Enable the program closure settings so a care team member can close any open items a client may have when they are updating a client's program status.

Manage program closure settings to enable the care team to quickly remove care team members and their open assigned/unassigned items when updating a client's program status to Disenrolled, Completed or Not Enrolled. Use the Show and Hide actions to display the additional program closure options to the care team for each applicable status, or to hide them from view.

1. Sign in with your administrator credentials.
2. Click **Care Planning > Programs > Program Closure Settings**. The **Display** state indicates whether configured closure settings are currently Shown and available to the care team to use, or Hidden and unavailable. By default, **Display** is set to Hidden
3. Use the **Show** and **Hide** actions to display the program closure settings to users or hide it from view.
  - To hide the program closure settings, from the row **Actions** menu, select **Hide**.
  - To show the program closure settings, from the row **Actions** menu, select **Show**.

## Configuring program status change reasons

When a care team member changes the program status of a client in Watson™ Care Manager, a reason can be recorded. You can configure and manage a library of reasons that indicate why a client's program status is changed in the application. You can configure program status change reasons for certain program statuses. For instance Completed, Re-enrollment (when you are re-enrolling a client), Not Enrolled and Disenrolled.

### Creating client program status change reasons

If a suitable client program status change reason does not exist in the library of configured reasons that come with the product, you can add a new reason. The reasons that you configure become available to the care team to select when they change the program status of a client.

The program status change reasons that are available by default when re-enrolling a client in a program are as follows: Opted In, Other.



#### Note:

these reasons are available when a care team member changes a client's program status to **Enrolled** during re-enrollment.

The program status change reasons that are available by default when a client is not enrolled in the program are as follows: Assigned In Error, Deceased, Declined, Met Exclusion Criteria, Non-Responder, Error.

The program status change reasons that are available by default when a client is disenrolled from the program are as follows: Assigned In Error, Deceased, Declined, Met Exclusion Criteria, Non-Responder, Error.

If a client completes a program, you can record a reason for their completion.

1. Sign in with your administrator credentials.
2. Click **Care Planning > Programs > Program Status Change Reasons**. The **Display** state indicates whether configured reasons are currently **Shown** and available to the care team to use, or **Hidden** and unavailable.
3. To add a new program status change reason, click **New**.
4. Enter a unique reason that does not duplicate any existing program status change reason in the library. From the Program Status list options, you can categorize the reason that you are adding as Completed, Re-Enrolled, Not Enrolled, or Disenrolled.
5. In the External System Reference field, you can associate an external system reference with the reason you are creating; enter a unique reference number of up to 20 alphanumeric characters. When sending program details in an API, the external system identifies the program status change reason by its external system reference.
6. Click **Save** to add the program status change reason to the library. The Program Status Change Reason list refreshes.
7. Use the **Show** and **Hide** actions to display the program status change reason to users or hide it from view.
  - To hide the program status change reason, from the row **Actions** menu, select **Hide**.
  - To show the program status change reason, from the row **Actions** menu, select **Show**.You cannot show or hide the Other reason so that a user can always enter a reason in the Other field.
8. To reorder the sequence of program status change reasons, click **Reorder**. Drag and drop the reasons to position them in your preferred order.

## Modifying client program status change reasons

You can update a program status change reason. When you change a program status change reason in the library of configured reasons, all existing instances in client records are updated.

The default program status change reasons that come with the product can be edited: Opted-In, Assigned In Error, Deceased, Declined, Met Exclusion Criteria, Non-Responder.

**Note:**

The Other program status change reason cannot be edited.

1. Sign in with your administrator credentials.
2. Click **Care Planning > Programs > Program Status Change Reasons**. The **Display** state indicates whether configured reasons are currently **Shown** and available to the care team to use, or **Hidden**. The External System Reference displays the external system reference that is associated with the reason. When you send a program status change reason as an API attribute, the external system identifies the reason by its external system reference.
3. To modify an existing program status change reason, from the row-level actions menu, click **Edit**. The program status change reason page opens. If you click **Save**, the list page is refreshed to display the updated program status change reason with corresponding External System Reference, if it is updated. You cannot edit the Other reason.
4. If required, you can create a new reason to add to the library of configured reasons within each category. See [Creating client program status change reasons \(on page 19\)](#).
5. Use the **Show** and **Hide** actions to display the program status change reason to the care team or hide it from view.
  - To hide the reason, from the Actions menu, select **Hide**.
  - To show the reason, from the Actions menu, select **Show**.
6. To reorder the sequence of program status change reasons, click **Reorder**. Drag and drop the reasons to position them in your preferred order.

## Configuring assessments

You can configure a library of assessments that care teams can use to help them to assess a client's needs. Assessments capture client information to generate results or scores. You can configure an assessment with or without a script. You can configure the assessments, scripts, conditional questions, measures, and assessment suggestions.

Configure assessments with a script to capture questions and answers and generate scores for specific measures. Configure assessments without a script so that only an assessment score can be recorded when the assessment is conducted outside Watson™ Care Manager. When an assessment is configured without a script, a score is manually entered for specific measures and the overall assessment score and results are generated. You can work with a draft version of an assessment without affecting the current active version.

#### Related information

[Configuring programs \(on page 14\)](#)

## Creating assessments

Assessments are versioned so that you can work on assessments without affecting the current active version. When you create an assessment, a draft version of the assessment is automatically created.

Draft assessment versions are in an **In Edit** state and the current active versions are in an **Active** state. You can configure only a version of a questionnaire that is in the **In Edit**, or draft, state. Only one **In Edit** version can exist.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Assessments**.  
The list of assessments is displayed.
3. Click **New**.  
The **New Assessment** page is displayed.
4. Enter a name for the assessment and a description, as needed.  
Descriptions can be up to 500 characters long.
5. If applicable, in the **External System Reference** field, associate an external system reference with the assessment record that you are creating. Enter a unique reference number of up to 20 alphanumeric characters.  
When sending an assessment as an API attribute, the external system identifies the assessment by its external system reference.
6. Choose an appropriate version type for this assessment.
  - Choose **Script** if this assessment version is a script that will contain questions and answers.
  - Choose **Score Only** if this assessment is configured without a script so that the care team can record an assessment score only. A care team might want to configure a Score Only assessment version if they're conducting a paper-based assessment with a client and only want to record a score for the assessment without running a script in Watson™ Care Manager.
7. In the **Display History Across Programs** field, enter the time period (in days) in which to display historical completed assessments to the care team.  
This option restricts the historical completed assessments that are available to a care team before they complete the assessment on a program, when the assessment was previously completed for the client on another program. For example, if you enter 0, no completion history prior to the program assignment date is displayed when the care team access the assessment from the new

program. If you enter 10, the completion history for the previous 10 days (program assignment date - 10 days) is displayed when the care team access the assessment on a new program. **Note:** Depending on the value that you enter, some or all historical versions of the assessment might be unavailable to the care team until they complete the assessment for the first time on the program. When completed, all historical versions of the assessment are displayed.

8. You can select the **Prefill Answers** check box to prefill the assessment answers with the most recent answers when care teams repeat the assessment. You can override this configuration at the question level in the configured assessment.
9. Click **Save**.

After you finish configuring an assessment version, you must activate the version to make the assessment available for use.

---

#### Related information

[Configuring external system references \(on page 241\)](#)

## Configuring assessment question scripts

You can script the assessment questions and answers, and configure their sequence and answer type. You can also add an attribution for the assessment, if required.

## Configuring assessment questions

You can add assessment questions and flag a question to make it optional or conditional. You can edit and delete questions.

## Adding assessment questions

Create the assessment questions, associate them with the correct answer types, and configure them as optional or conditional. You can use color to emphasize assessment questions or information, and you can provide links to external websites for more information.

It is important to enter the questions in the correct sequence. Questions are displayed in the order that you enter them. You must enter conditional questions directly after the questions that call them. To call conditional questions, you must choose a user-defined answer type. The default answer types cannot be used to call conditional questions.

You can enter up to 80 questions, and you can use color to highlight the importance of certain questions or information in the assessment.



**Important:**

If your organization interacts with individuals who are visually impaired, do not use color to highlight the importance of the question or information. State the importance of the question or information in the text.

For each question, you can see the answer type and whether the question is optional or conditional. You can expand a question to see more details. For user-defined answer types, the answer options are displayed.

For each question, you can configure up to three hyperlinks to external websites so that a care team can link individuals to supplementary reference information.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Assessments**.

The list of assessments is displayed.

3. Expand an assessment. The assessment versions are displayed.

4. Open a draft version.

- If an **In Edit** version exists, click the assessment name to open the in-edit version.
- If no **In Edit** version exists, select **New Version** from the assessment **Actions** menu and accept the default type to create an in-edit version.

The assessment's **Script** tab is displayed.

5. Click **New Question** to create a question.

The **New Questions** page opens.

- a. Enter the question text.

- b. From the **Question Color** list, choose the color in which to display the question text for added emphasis.

Text color defaults to black. You can change the color.

- c. Select options as needed:

- From the **Answer Type** list, choose **Check Box**, **Date**, **Decimal**, **Multiple Line Text**, **Number**, **Text**, **Text (No Answer)**, or a user-defined answer type. **Multiple Line Text** fields have a limit of 4000 characters.

A user-defined answer type consists of the answer options and the display type. The display type defines how the options are displayed, for example, as radio buttons.

Only user-defined answer types can be used to call conditional questions.

**Note:**

You can leave the **Answer Type** field blank. Later, you can associate any answer type with the question.

- If you selected **Prefill Answers** when you created the assessment, by default all answers to the assessment questions are prefilled with the most recent responses when care teams repeat the assessment. The **Prefill Answer** option allows you to override the assessment level configuration for the answer to this question if needed. You can choose to always prefill the answer to this question, never prefill the answer to this question, or choose the assessment configuration. If you choose the assessment configuration, the answer to this question will be prefilled (if previously answered) or not based on the assessment configuration. Your selection is effective the next time care teams repeat the assessment.
- **Optional** makes the question optional. Clear the check box to make the question mandatory.
- **Conditional** makes the question display only if a client answers in a certain way to a previous question that drives the condition. (You associate a conditional question with a specific question. Go to the **Conditions** tab to associate the conditional question with a principal question.)

- d. Enter information about the question, as needed.
- e. From the **Information Color** list, choose the color in which to display the informational text for added emphasis.
- f. In each **Reference URL** field, provide a link to an external website that contains supplementary reference information. Enter the hyperlink in this format: `https://www.example.com.`

The hyperlinks that you define to support a question are displayed in plain text and are not clickable. To the care team, the links display as clickable links.

- g. Select **Add** to add each question and **Save** to save your questions when complete.

## Adding read-only instructional text to an assessment

When running an assessment with a client, the care team might need read-only instructional text to be displayed in any sequence on the assessment script. You can configure an assessment script to include instructional text in the place of a question, and specify that no answer is required of the client.

For example, suppose that a client with diabetes need not answer some questions in an assessment script because those questions don't apply to individuals with that medical condition. In the place of a question in the script, you can specify the read-only instructional text to inform the client about which questions to skip.

No answer type is required to follow the instructional text that you specify.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Assessments**.  
The list of assessments is displayed.
3. Expand an assessment. The assessment versions are displayed.
4. Open a draft version.
  - If an **In Edit** version exists, click the assessment name to open the in-edit version.
  - If no **In Edit** version exists, select **New Version** from the assessment **Actions** menu and accept the default type to create an in-edit version.
5. Click **New Question** in the drop-down menu to open the **New Questions** page.
  - a. In the **Question** field, enter the read-only instructional text instead of a question.
  - b. From the **Answer Type** list, choose **Text (No Answer)**.
  - c. Select **Optional** because the answer type of **Text (No Answer)** means that a client's answer is not mandatory.
  - d. Enter information about the instructional text, as needed.
  - e. Select **Add** to add the read-only text and **Save** to save the assessment when complete.
6. **Optional:** Select **Validate** to validate the assessment version.

## Editing assessment questions

You can update the questions or information in an assessment, and reorder the sequence in which the questions are displayed. You can use color to emphasize questions or information, and you can provide links to external websites for more information.

It is important to enter the questions in the correct sequence. Questions are displayed in the order that you enter them. You must enter conditional questions directly after the questions that call them. To call conditional questions, you must choose a user-defined answer type. The default answer types cannot be used to call conditional questions.

You can enter up to 80 questions, and you can use color to highlight the importance of certain questions or information in the assessment.

**Important:**

If your organization interacts with individuals who are visually impaired, do not use color to highlight the importance of the question or information. State the importance of the question or information in the text.

For each question, you can see the answer type and whether the question is optional or conditional. You can expand a question to see more details. For user-defined answer types, the answer options are displayed.

For each question, you can configure up to three hyperlinks to external websites so that a care team can link individuals to supplementary reference information.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Assessments**.

The list of assessments is displayed.

3. Expand an assessment. The assessment versions are displayed.

4. Open a draft version.

- If an **In Edit** version exists, click the assessment name to open the in-edit version.
- If no **In Edit** version exists, select **New Version** from the assessment **Actions** menu and accept the default type to create an in-edit version.

The assessment's **Script** tab is displayed.

5. Select **Edit** in the **Actions** menu of any row in the **Questions** section.

The **Edit Question** page opens.

- Modify the question text, and to emphasize a question as important, from the **Question Color** list, choose the color in which to display the text.
- Modify the answer type for the question. Available answer types are **Check Box**, **Date**, **Decimal**, **Multiple Line Text**, **Number**, **Text**, **Text (No Answer)**, or user-defined answer types.

A user-defined answer type consists of the answer options and the display type. The display type defines how the options are displayed, for example, as radio buttons. Only user-defined answer types can be used to call conditional questions.

- If you selected **Prefill Answers** when you created the assessment, by default all answers to the assessment questions are prefilled with the most recent responses when care teams repeat the assessment. You can choose to always prefill the answer to this question, never prefill the answer to this question, or choose the assessment configuration. If you choose the assessment configuration, the answer to this question will be prefilled (if previously

answered) or not based on the assessment configuration. Your selection is effective the next time care teams repeat the assessment.

- **Optional** makes the question optional. Clear the check box to make the question mandatory.
- **Conditional** makes the question display only if a client answers in a certain way to a previous question that drives the condition. (You associate a conditional question with a specific question. Go to the **Conditions** tab to associate the conditional question with a principal question.)
- Enter information about the question, as needed.
- From the **Information Color** list, choose the color in which to display informational text for added emphasis.
- In each **Reference URL** field, provide a link to an external website that contains supplementary reference information. Enter the hyperlink in this format: `https://www.example.com`.

The hyperlinks that you define to support a question are displayed in plain text and are not clickable. To the care team, the links display as clickable links.

6. To reorder the sequence of questions in the assessment, click **Reorder Questions**.

The **Reorder Questions** page opens. Drag and drop the questions to position them in your preferred order.

## Editing read-only instructional text in an assessment

When running an assessment with a client, the care team might need read-only instructional text to be displayed in any sequence on the assessment script. You can update an assessment script to include instructional text in the place of a question, with no answer required of the client by design.

For example, suppose that a client with diabetes need not answer some questions in an assessment script because those questions don't apply to individuals with that medical condition. In the place of a question in the script, you can specify the read-only instructional text to inform the client about which questions to skip.

No answer type is required to follow the instructional text that you specify.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Assessments**.  
The list of assessments is displayed.
3. Expand an assessment. The assessment versions are displayed.

4. Open a draft version.
  - If an **In Edit** version exists, click the assessment name to open the in-edit version.
  - If no **In Edit** version exists, select **New Version** from the assessment **Actions** menu and accept the default type to create an in-edit version.
- The assessment's **Script** tab is displayed.
5. Click **Edit** in the **Actions** menu of the instructional text entry to open the **Edit Question** page.
6. In the **Question** field, update the details of the instructional text as needed.
7. From the **Answer Type** list, select **Text (No Answer)**.
8. Select **Optional** because the answer type of **Text (No Answer)** means that a client's answer is not mandatory.
9. Select **Add** to add the updated text and **Save** to save the assessment when complete.
10. **Optional:** Select **Validate** to validate the assessment version.

## Deleting assessment questions

You can delete questions from an assessment.

1. Sign in with your administrator credentials.

Your home page opens.
2. Click **Assessments**.

The list of assessments is displayed.
3. Expand an assessment. The assessment versions are displayed.
4. Open a draft version.
  - If an **In Edit** version exists, click the assessment name to open the in-edit version.
  - If no **In Edit** version exists, select **New Version** from the assessment **Actions** menu and accept the default type to create an in-edit version.
- The assessment's **Script** tab is displayed.
5. Click **Delete** in the **Actions** menu of any row in the **Questions** section.

The selected question is removed from the version of the assessment that you are working on.
6. **Optional:** Select **Validate** to validate the assessment version.

## Configuring user-defined answer types for assessment answers

In addition to the default answer types, you can configure user-defined answer types for your assessment answers. You must create the answer types and define the associated answer options and scores, and define how the answer options are displayed. You can edit or delete user-defined answer types, and associate answer types with questions.

You can define answer types Drop down, Multiple Select and Radio Button. You can define answer values for each of these types.

The following default answer types are available.

- Check Box
- Date
- Decimal
- Multiple Line
- Number
- Text

For other answers, create your own user-defined answer types. A user-defined answer type consists of the answer options and the display type. The display type defines how the options are displayed, for example, as radio buttons. Only user-defined answer types can be used to call conditional questions.

The **Answers** section shows the user-defined answer types that are configured for the assessment. You can view the answer types and the associated answers and scores.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Assessments**.

The list of assessments is displayed.

3. Expand an assessment. The assessment versions are displayed.

4. Open a draft version.

- If an **In Edit** version exists, click the assessment name to open the in-edit version.
- If no **In Edit** version exists, select **New Version** from the assessment **Actions** menu and accept the default type to create an in-edit version.

The assessment's **Script** tab is displayed.

5. Create an answer type and associated answers for use in the assessment.

- a. Select **New Answer Type**.

- b. Enter a name.

- c. Select the display type for the answer options.

The available display types are drop-down list, multiple selection list, or radio button.

- d. Enter the answer texts (200 characters maximum) for each answer option in the order that you want them to display. Enter a numerical **Score** value, and click **Add**.

- The **Answer** text is visible to the user when they run the assessment.
  - Available answers include **Yes, No; and Never, Sometimes, Always**.
  - The score value is used to score a completed assessment.
- e. Click **Save** to create the answer type.  
 The answers are displayed in the order that you enter them.
6. To reorder the sequence of answers in the questionnaire, click **Reorder Answers** in the **Actions** menu of any answer. In the **Reorder Answers** page, drag and drop the answers to position them in your preferred order.
7. Do the following tasks in the **Actions** menu of rows in the **Answers** section.
- You can make these selections in an **Answer Type** row.
    - Click **Associate with Questions** to associate an answer type with any questions that do not have an assigned answer type.
    - Click **Edit**. The **Edit Answer Type** page is displayed. Modify name or type, and add answers, as needed.
    - Click **Delete**. When you delete an answer type, the associated answers are deleted. The association with questions is also removed.
  - In an **Answer** row, click **Edit** or **Delete**.
8. **Optional:** Select **Validate** to validate the assessment version.

## Configuring assessment clusters

You can add, edit, and delete clusters to configure the layout and scoring of assessments. If an assessment has more than one measure, clusters are required to score the measures separately.

You can use color to highlight the importance of information in the cluster.



### Important:

If your organization interacts with individuals who are visually impaired, do not use color to highlight the importance of information. State the importance of the information in the text.

1. Sign in with your administrator credentials.  
 Your home page opens.
2. Click **Assessments**.  
 The list of assessments is displayed.
3. Expand an assessment. The assessment versions are displayed.
4. Open a draft version.

- If an **In Edit** version exists, click the assessment name to open the in-edit version.
- If no **In Edit** version exists, select **New Version** from the assessment **Actions** menu and accept the default type to create an in-edit version.

The assessment's **Script** tab is displayed.

5. Click **New Cluster**. The **New Cluster** page opens.

- a. Give the cluster a title and select **Display Title** if you want users to see the title when they use the assessment.
- b. Enter more information about the assessment, if needed.
- c. From the **Information Color** list, choose the color in which to display informational text for added emphasis.
- d. Select questions to associate with the cluster.
  - Only questions that are not conditional are available to select.
  - Whenever you add a parent question to a cluster, all of the parent's child questions are added.

6. Do the following tasks in the **Actions** menu of any row in the **Clusters** section.

- Click **Edit** to open the **Edit Cluster** page.
    - a. As needed, update the cluster title.
    - b. Select or clear the **Display Title** option to control whether users see the title when they use the assessment.
    - c. Enter more information about the assessment, if needed.
    - d. From the **Information Color** list, choose the color in which to display informational text for added emphasis.
    - e. Select questions to associate with the cluster.
      - Only questions that are not conditional are available to select.
      - Whenever you add a parent question to a cluster, all of the parent's child questions are added.
  - Click **Delete** to remove the selected cluster.
7. To remove a question from the cluster, click **Remove** in the **Actions** menu of any question row in the **Clusters** section.
- If the question is included in a condition, any conditional questions that are linked to it are also removed.
8. **Optional:** Select **Validate** to validate the assessment version.

## Configuring assessment attributions

You can view, add, and edit attribution details that are associated with an assessment. The **Attribution** section displays the attribution or copyright text for the assessment.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Assessments**.  
The list of assessments is displayed.
3. Expand an assessment. The assessment versions are displayed.
4. Open a draft version.
  - If an **In Edit** version exists, click the assessment name to open the in-edit version.
  - If no **In Edit** version exists, select **New Version** from the assessment **Actions** menu and accept the default type to create an in-edit version.
5. Select **Edit Attribution** in the drop-down menu.  
The **Edit Attribution** page is displayed.
6. Enter the attribution text and save it.  
For example, an attribution can specify the source patient health questionnaire, like the PHQ-9 assessment:

“Developed by Doctors Robert L. Spitzer, Janet B.W. Williams, Kurt Kroenke, and colleagues, with an educational grant from Pfizer, Inc.”

## Configuring conditional questions for assessments

You can configure extra conditional questions to display in response to client answers in an assessment. To do this, you must create a condition that associates the conditional questions with a specific question and answer.

Before you can create conditions, you must configure at least one non-conditional question and one conditional question on your assessment. The order of the questions in the assessment is important, the conditional question must follow the question with no other questions between them. A conditional question can call another conditional question, again only when it is next in order. Only questions that have user-defined answer types and that are on the currently selected assessment are available.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Assessments**.  
The list of assessments is displayed.

3. Expand an assessment. The assessment versions are displayed.
4. Open a draft version.
  - If an **In Edit** version exists, click the assessment name to open the in-edit version.
  - If no **In Edit** version exists, select **New Version** from the assessment **Actions** menu and accept the default type to create an in-edit version.

The assessment's **Script** tab is displayed.

5. Click the **Conditions** tab.

The list of conditions is displayed.

6. Click **New**.

The configuration wizard is displayed. The first wizard page lists the questions that exist in the assessment.

- a. Select a question, and click **Next**.
- b. Select the answer that will drive the condition, and click **Next**.
- c. Select the conditional questions to associate with your question and answer. You see only the questions that immediately follow the parent question.
- d. Click **Save**.

7. Manage conditional questions as follows.

- Click the **Add Conditional Questions** action to add more questions to a condition.
- Click the **Remove** action on a question-answer pair to remove the question, answers, and all associated conditional questions from the list.
- Click the **Remove** action on a conditional question to remove the conditional question from the list.

8. **Optional:** Select **Validate** to validate the assessment version.

## Configuring assessment measures

A measure is an aspect of a client's circumstances that is to be measured during an assessment for example, Anxiety, Depression Severity, or Falls Risk. You can add, edit, and delete the measures for an assessment.

### Adding measures

You can only add measures to In-Edit versions of existing assessments that are not in an Active state. Each assessment must have one or more measures, for example, measures of a client's Anxiety, Depression Severity, or Falls Risk.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Assessments**.

The list of assessments is displayed.

3. Expand an assessment. The assessment versions are displayed.

4. Open a draft version.

- If an **In Edit** version exists, click the assessment name to open the in-edit version.
- If no **In Edit** version exists, select **New Version** from the assessment **Actions** menu and accept the default type to create an in-edit version.

The assessment's **Script** tab is displayed.

5. Click the **Measures** tab.

The list of measures is displayed.

6. Click **New** to specify the details of a new measure.

**Name**

Enter a name for the new measure.

**External System Reference**

Associate an external system reference with the measure that you are creating.

Enter a unique reference number of up to 20 alphanumeric characters. When sending a measure as an API attribute, the external system identifies the measure by its external system reference.

**Range**

Enter the minimum number (typically 0) and a maximum number for the range. The maximum is the sum of all of the classifications on the assessment.

**Threshold**

You can enter a threshold, which is an entry point for a measure during an assessment.



**Note:**

Measure values are always displayed on the care team application even if they are below the Threshold value. When a team member interprets the measure displayed, a value below the threshold means that a client is not affected by the measure and a value above the threshold means that a client falls into the range of the measure and a corrective action might be required.

**Description**

You can enter a description for the measure.

### Scored From Cluster

This setting is available when the assessment type is **Script** and multiple clusters have been configured for the assessment script. Use this setting for scoring purposes, in multiple measure assessments. The setting associates questions in an individual cluster with a particular measure. You select from a list of all clusters that are not currently associated with a measure. When multiple measures are configured for the assessment, each measure must be associated with a separate cluster.

7. Click **Save**.

## Editing measures

You can only update measures in In-Edit versions of existing assessments that are not in an Active state. Each assessment must have one or more measures, for example, measures of a client's Anxiety, Depression Severity, or Falls Risk.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Assessments**.  
The list of assessments is displayed.
3. Expand an assessment. The assessment versions are displayed.
4. Open a draft version.
  - If an **In Edit** version exists, click the assessment name to open the in-edit version.
  - If no **In Edit** version exists, select **New Version** from the assessment **Actions** menu and accept the default type to create an in-edit version.The assessment's **Script** tab is displayed.
5. Click the **Measures** tab.  
The list of measures is displayed.
6. Select **Edit** in the **Actions** menu of a measure. The **Edit Measure** page opens.

### Name

Update the name of the new measure.

### External System Reference

Associate an external system reference with the measure that you are updating.

Enter a unique reference number of up to 20 alphanumeric characters. When sending a measure as an API attribute, the external system identifies the measure by its external system reference.

### Range

Update the minimum number (typically 0) and the maximum number for the range.

The maximum is the sum of all of the classifications on the assessment.

### Threshold

You can update the threshold, which is an entry point for a measure during an assessment.



#### Note:

Measure values are always displayed on the care team application even if they are below the Threshold value. When a team member interprets the measure displayed, a value below the threshold means that a client is not affected by the measure and a value above the threshold means that a client falls into the range of the measure and a corrective action might be required.

### Description

You can update the description for the measure.

### Scored From Cluster

This setting is available when the assessment type is **Script** and multiple clusters have been configured for the assessment script. Use this setting for scoring purposes, in multiple measure assessments. The setting associates questions in an individual cluster with a particular measure. You select from a list of all clusters that are not currently associated with a measure. When multiple measures are configured for the assessment, each measure must be associated with a separate cluster.

7. Click **Save**.

## Deleting measures

You can delete the measures from an assessment.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Assessments**.

The list of assessments is displayed.

3. Expand an assessment. The assessment versions are displayed.

4. Open a draft version.

- If an **In Edit** version exists, click the assessment name to open the in-edit version.
- If no **In Edit** version exists, select **New Version** from the assessment **Actions** menu and accept the default type to create an in-edit version.

The assessment's **Script** tab is displayed.

5. Click the **Measures** tab.

The list of measures is displayed.

6. Select **Delete** from the **Actions** menu of a measure.

The **Delete Measure** page opens.

7. Click **Yes**. The measure is removed from the assessment version that you are working on.

## Configuring assessment measure classifications

Classifications divide an assessment measure into ranges. When a client is assessed, the scores that are associated with the information they provide are summed. The score that is achieved by the client places that client in a particular classification, for example, Mild, Moderate, or Severe.

### Adding classifications

You can add classifications to measures so that you can identify client needs based on how they are classified when they are assessed.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Assessments**.

The list of assessments is displayed.

3. Expand an assessment. The assessment versions are displayed.

4. Open a draft version.

- If an **In Edit** version exists, click the assessment name to open the in-edit version.
- If no **In Edit** version exists, select **New Version** from the assessment **Actions** menu and accept the default type to create an in-edit version.

The assessment's **Script** tab is displayed.

5. Click the **Measures** tab.

The list of measures is displayed.

6. Select **New Classification** in the **Actions** menu of a measure to specify the details of a new classification.

#### Classification

Enter a name for the new classification.

#### Range

You can enter the minimum and maximum numbers for the range. These values are defined by the assessment instrument classifications.

#### Description

You can enter a description of the classification.

7. Click **Save**.

## Editing classifications

You can edit the measure ranges for the scores and add classifications that cover the range.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Assessments**.  
The list of assessments is displayed.
3. Expand an assessment. The assessment versions are displayed.
4. Open a draft version.
  - If an **In Edit** version exists, click the assessment name to open the in-edit version.
  - If no **In Edit** version exists, select **New Version** from the assessment **Actions** menu and accept the default type to create an in-edit version.The assessment's **Script** tab is displayed.
5. Click the **Measures** tab.  
The list of measures is displayed.
6. Select **Edit** in the **Actions** menu of a classification to edit the details of a classification.

#### Classification

You can modify the name of the new classification.

#### Range

You can update the minimum and maximum numbers for the range. These values are defined by the assessment instrument classifications.

#### Description

You can update the description of the classification.

7. Click **Save**.

## Deleting classifications

You can delete classifications that are associated with an assessment measure.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Assessments**.  
The list of assessments is displayed.
3. Expand an assessment. The assessment versions are displayed.
4. Open a draft version.
  - If an **In Edit** version exists, click the assessment name to open the in-edit version.
  - If no **In Edit** version exists, select **New Version** from the assessment **Actions** menu and accept the default type to create an in-edit version.
- The assessment's **Script** tab is displayed.
5. Click the **Measures** tab.  
The list of measures is displayed.
6. Select **Delete** in the **Actions** menu of a classification. The **Delete Classification** page opens.
7. Click **Yes**. The classification is removed from the measure that you are working on.

## Suggesting goals and actions based on measure classifications

You can configure specific goals or actions to be suggested for an individual based on their assessment results. If their assessment results match a specified measure classification, the goal or action is suggested for their care plan.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Assessments**.  
The list of assessments is displayed.
3. Click an assessment.  
The assessment opens.
4. Click **Suggestions > Measure Suggestions**.  
The measure suggestions list is displayed.
5. Add the suggestions as follows:
  - a. Click **Suggestion**.  
The **Suggestion** wizard opens.
  - b. If the assessment has multiple measures, select a measure and click **Next**.
  - c. Select the classifications to associate with the suggestions, and click **Next**.
  - d. Select the suggestions.

- **Goal** - Search for and select the goal that you want to suggest.
- **Action** - Search for and select an action that you want to suggest. If you select an action, you must select a goal.
- **Reason** - Enter the reason for the suggestions, as needed.

e. Click **Save**.

## Generating goals and actions suggestions based on measure classifications

You can automatically add goals or actions to an individual's plan based on their assessment results. If their results match a specified measure classification, the goal or action is added to the plan.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Assessments**.

The list of assessments is displayed.

3. Click an assessment.

The assessment opens.

4. Click **Suggestions > Measure Suggestions**.

The measure suggestions list is displayed.

5. Automatically add suggestions as follows:

a. Click **Automatically Add**.

The **Automatically Add** wizard opens.

b. If the assessment has multiple measures, select a measure and click **Next**.

c. Select the measure classifications for which you want to automatically add suggestions and click **Next**.

d. Select the suggestions.

- **Goal** - Search for and select a goal.

- **Action** - Search for and select an action. If you select an action, you must select a goal.

- **Action Status** - Select whether the action is added as open or completed. You can select to have actions automatically added as completed for any actions that care teams complete by completing an assessment so that care team members do not have to manually add and complete them. For example, a completed action of

“Assess for signs of depression” might be added after a user runs a PHQ9 depression assessment.

- **Assign Action to Role** - By default, client actions are assigned to the individual and care team actions are assigned to the user who completed the assessment. You can assign care team actions to a specific care team role. The care team actions are added to the unassigned list for users with that care team role who can accept and complete the actions. Only care team roles that are currently assigned to users are available for selection.
- **Reason** - You can enter a suggestion reason.

- e. Click **Save**.

## Suggesting goals and actions based on answers to assessment questions

You can configure goals or actions to be suggested for a clients plan based on answers they provide to a question.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Assessments**.

The list of assessments is displayed.

3. Click an assessment.

The assessment opens.

4. Click **Suggestions > Question Suggestions**.

The question suggestions list is displayed.

5. Add the suggestions as follows:

- a. Click **Suggest**.

The **Suggest** wizard opens.

- b. Select a question and click **Next**.

Only questions that have associated user-defined or text answers are displayed.

- c. Select the answer to associate with the question, and click **Next**.

- d. Select the suggestions.

A goal or action must be preconfigured to be available to you to suggest.

- **Goal** - Search for and select the goal that you want to suggest.
- **Action** - Search for and select an action that you want to suggest. If you select an action, you must select a goal.
- **Reason** - Enter the reason for the suggestions, as needed.

e. Click **Save**.

## Generating goals and actions suggestions based on answers to assessment questions

You can configure goals or actions to be automatically suggested for a clients plan based on answers they provide to a question.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Assessments**.

The list of assessments is displayed.

3. Click an assessment.

The assessment opens.

4. Click **Suggestions > Question Suggestions**.

The question suggestions list is displayed.

5. Automatically add suggestions as follows:

a. Click **Automatically Add**.

The **Automatically Add** wizard opens.

b. Select a question and click **Next**.

Only questions that have associated user-defined or text answers are displayed.

c. Select the answer to associate with the question, and click **Next**.

d. Select the suggestions.

You must have already configured a goal or action for it to be available to you to suggest.

- **Goal** - Search for and select a goal.
- **Action** - Search for and select an action. If you select an action, you must select a goal.
- **Action Status** - Select whether the action is added as open or completed. You can select to have actions automatically added as completed for any actions that care teams complete by completing an assessment so that care team members do

not have to manually add and complete them. For example, a completed action of “Assess for signs of depression” might be added after a user runs a PHQ9 depression assessment.

- **Assign Action to Role** - By default, client actions are assigned to the individual and care team actions are assigned to the user who completed the assessment. You can assign care team actions to a specific care team role. The care team actions are added to the unassigned list for users with that care team role who can accept and complete the actions. Only care team roles that are currently assigned to users are available for selection.
- **Reason** - You can enter a suggestion reason.

- e. Click **Save**.

## Generating tasks based on measure classifications

You can automatically add tasks to an individual's plan based on their assessment results. If their results match a specified measure classification, the task is added to the plan.

You can assign the tasks to a care team role or care team member to complete. If you do not assign the task to a care team role, the task is created for the care team member who completes the assessment with the client.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Assessments**.

The list of assessments is displayed.

3. Click an assessment.

The assessment opens.

4. Click **Tasks > Measure Tasks**.

The tasks for the assessment measure are displayed.

5. Choose the appropriate option:

- Add a task to an assessment.

- a. Click **Add Task**.

- For single-measure assessments, search for the name of the task, and select a task name in the **Results** list.

- For multiple-measure assessments.

- i. Select a measure, and click **Next**.

- ii. Search for the name of the task, and select a task name in the **Results** list.

- b. From the **Tasks Status** list, set the task to be created as **Open** or **Closed**. By default, tasks are created as open. You might record tasks that were completed while a client was progressing through the assessment as closed.
- c. From the list of available care team roles, select a role to assign the task to. Only care team roles that are currently assigned to users are available to choose.

Tasks are added to the unassigned list for users with that care team role who can accept and complete the task. If you do not select a role, the task is assigned to the user who completed the assessment.

- d. Select the classifications that trigger task creation, and click **Save**.
- Remove a task by clicking **Remove** in the **Actions** menu of a task row.

---

#### Related information

[Configuring tasks \(on page 136\)](#)

## Generating tasks based on answers to assessment questions

You can configure tasks to be generated for an individual's plan based on answers they provide to an assessment question.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Assessments**.

The list of assessments is displayed.

3. Click an assessment.

The assessment opens.

4. Click **Tasks > Question Tasks**.

The question task list is displayed.

5. Add the task as follows:

- a. Click **Add Task**.

The **Add Task to Question** wizard opens.

- b. Select a question and click **Next**.

Only questions that have associated user-defined or text answers are displayed.

- c. Select the answer to associate with the question, and click **Next**.

- d. Search for and select the task to add.

A task must be preconfigured to be available to you to add.

- e. Click **Save**.

## Generating alerts based on measure classifications

You can automatically add alerts to an individual's plan based on their assessment results. If their results match a specified measure classification, the alert is added to the plan.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Assessments**.

The list of assessments is displayed.

3. Click an assessment.

The assessment opens.

4. Click **Alerts > Measure Alerts**.

The alerts for the assessment measure are displayed.

5. Choose the appropriate option:

- Add an alert to an assessment.

- a. Click **Add Alert**.

- For single-measure assessments, search for the name of the alert, and select an alert name in the **Results** list.
- For multiple-measure assessments.

- i. Select a measure, and click **Next**.

- ii. Search for the name of the alert, and select an alert name in the **Results** list.

- b. From the list of available alerts, select one to be automatically added to the care team member's alert list.

- c. Select a **Priority** value.

- d. Optionally, enter a note.

- e. Optionally, select **Care Team** or leave blank. If **Care Team** is selected, all individuals who are Care Team members at the time of the assessment completion are notified of the alert. If **Care Team** is not selected, the alert will appear on the clients context pane.

- f. Select the classifications that trigger alert creation, and click **Save**.

- Remove an alert by clicking **Remove** in the **Actions** menu of an alert row.

## Generating alerts based on answers to assessment questions

You can configure alerts to be generated for an individual's plan based on answers they provide to an assessment question.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Assessments**.

The list of assessments is displayed.

3. Click an assessment.

The assessment opens.

4. Click **Alerts > Question Alerts**.

The question alert list is displayed.

5. Add the alert as follows:

- a. Click **Add Alert**.

The **Add Alert to Question** wizard opens.

- b. Select a question and click **Next**.

Only questions that have associated user-defined or text answers are displayed.

- c. Select the answer to associate with the question, and click **Next**.

- d. From the list of available alerts, select one to be automatically added to the care team member's alert list.

- e. Optionally, enter a note.

- f. Optionally, select **Care Team** or leave blank. If **Care Team** is selected, all individuals who are Care Team members at the time of the assessment completion are notified of the alert. If **Care Team** is not selected, the alert will appear on the clients context pane.

- g. Select the answers that you want to generate the alert.

- h. Click **Save**. Each question and answer for which you configure an automatic alert is listed.

- Remove an alert by clicking **Remove** in the **Actions** menu of an alert row.

## Activating assessments

When you finish working on an assessment, you must activate your draft version to make your changes available for use. Validate the assessment version and correct any issues before you activate it.

When you activate a draft version, if a previous version of the assessment is shared with external systems, Watson™ Care Manager automatically shares your new version and stops sharing the previous version. For more information, see [Sharing assessments with external systems \(on page 48\)](#).

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Assessments**.  
The list of assessments is displayed.
3. Expand an assessment. The assessment versions are displayed.
4. Open a draft version.
  - If an **In Edit** version exists, click the assessment name to open the in-edit version.
  - If no **In Edit** version exists, select **New Version** from the assessment **Actions** menu and accept the default type to create an in-edit version.The assessment's **Script** tab is displayed.
5. Click the **Measures** tab.  
The measures for the assessment are displayed.
6. Select **Validate** in the drop-down menu to validate the assessment version.
7. Select **Activate** in the drop-down menu to activate the assessment version.  
By setting the **Effective From** date, you can specify a date in the future when care teams can start to use the new version.
8. In the activation modal, enter comments that describe your changes to the version, and then click **Yes**.  
The comments are displayed with the version's activation date in the assessment's Details cluster.

## Sharing assessments with external systems

Set sharing options to share *Completed* client assessments between Watson™ Care Manager and external systems (via an API) so that users of both systems have the client's latest assessment information. Download the API document for a shared assessment and distribute it to the systems integrator for your organization so that they can update integrations to use the latest version of the assessment. You can stop sharing an assessment to prevent the sharing of its data with external systems.

## Sharing assessment versions

You can allow assessment sharing with a system external to Watson™ Care Manager, for example, a hospital information system.

Ensure that you associate an external system reference with the assessment. The external system reference is required so that the external system can uniquely identify the assessment when it is sent between Watson™ Care Manager and an external system.

In addition, ensure that you configure source and original source systems for assessments if needed. Source and original source systems values confirm where assessments come from. For more information, see [Configuring data sources \(on page 195\)](#).

External systems can retrieve completed client assessments that they are notified about. The completed assessments are shared from Watson™ Care Manager by using the Assessments API. For Watson™ Care Manager to send a notification to the external system when the assessment is completed by care teams, you must subscribe to notifications about the Assessment data type by [Subscribing to notifications \(on page 286\)](#).

You can share only **Active** assessments. In addition, only one shared version of a single assessment can exist. When you share a new assessment version, Watson™ Care Manager automatically stops sharing any existing version that is already shared.

After you share an assessment version, you can share its API definition document with the systems integrator for your organization.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Assessments**.  
The list of assessments is displayed.
3. Expand an assessment.
4. Click the **Actions** menu of an **Active** assessment version, and select **Share**.  
The **Share Assessment Version** page opens.
5. Click **Share** to share the assessment version.

[Sharing the API document for an assessment \(on page 49\)](#)

## Sharing the API document for an assessment

When you share an assessment, Watson™ Care Manager generates an API document in JSON format. You can download the document to distribute to the relevant integrator for your organization.

The API document contains the REST API calls and structure that Watson™ Care Manager requires for external systems to share completed client assessments with Watson™ Care Manager and for Watson™ Care Manager to share completed client assessments with external systems. Your integrator uses the API document to understand what data is expected from the receiving system and the format of the data.



**Note:**

The option to download an API document for an assessment is available only when a version is **Active** and shared. The API document is compatible only with Version 2.0 of the Swagger Editor.



**Important:**

Whenever you modify or create a new version of an assessment that is shared with external systems, you may need to redistribute its API document to your organization's integrator. Otherwise, existing integrations might fail.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Assessments**.  
The list of assessments is displayed.
3. From the **Actions** menu for an **Active** assessment that is shared, click **Share Document** to download its API document.
4. Click **Download**.
5. Browse to where you want to store the file on your computer.
6. Distribute the document to the systems integrator for your organization.

## Stopping assessment version sharing

You can stop sharing an assessment version to prevent sharing of client information captured in respect of the assessment with external systems.

If you stop sharing an assessment version that is already in use in existing integrations, you might cause existing integrations to fail. Client information that is recorded in respect of the assessment will no longer be shared between Watson™ Care Manager and external systems.

When you stop sharing an assessment, you can allow sharing again of any active version of the assessment, if needed.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Assessments**. The list of assessments is displayed.
3. Expand an assessment.
4. Click the **Actions** menu of an **Active** and shared assessment version, and select **Stop Sharing**.  
The **Stop Sharing Assessment Version** page opens.
5. Click **Stop Sharing** to stop sharing the assessment version with external systems.

## Updates to assessments and external systems

Occasionally, you might need to create a new version of an assessment or modify an existing version. If the assessment is shared with an external system, some updates require you to redistribute its API document to your organization's integrator.



### Important:

If your changes impact existing integrations, you must follow your organization's internal process to make the latest version of the assessment API document available to your organization's integrator. Your integrator uses the document to sync the information that is captured in respect of your latest assessment version with the external system.

### Which assessment updates impact integrations?

The table lists the updates that you can make when you modify an assessment and whether they impact existing integrations.

**Table 1. Assessment updates**

Category	Update	Does this update impact integrations? (Yes/No)	More information
Layout	Adding, updating, or deleting clusters	No	<a href="#">Configuring assessment clusters (on page 31)</a>
Questions	Adding a mandatory question	Yes	<a href="#">Adding assessment questions (on page 23)</a>
	Deleting a mandatory question	Yes	<a href="#">Deleting assessment questions (on page 29)</a>
	Adding an optional question	No	<a href="#">Adding assessment questions (on page 23)</a>
	Deleting an optional question	Yes	<a href="#">Deleting assessment questions (on page 29)</a>

**Table 1. Assessment updates (continued)**

Category	Update	Does this update impact integrations? (Yes/No)	More information
	Adding a conditional question	No	<a href="#">Adding assessment questions (on page 23)</a>
	Deleting a conditional question	No	<a href="#">Deleting assessment questions (on page 29)</a>
Assessment type	Changing an assessment type from Script to Score Only	Yes	<a href="#">Modifying assessments (on page 52)</a>
Versioning	Configuring one version of an assessment for display in Watson™ Care Manager and a different version for integration purposes.	No  Do not configure separate versions. Configure only one version of an assessment for display in both Watson™ Care Manager and for integration purposes.	

## Troubleshooting

If existing integrations fail because you did not make the API document for a new assessment version available to your organization's integrator, stop sharing your new version, then share a previous version of the assessment that you know works.

## Modifying assessments

You can update an assessment that is in an **In Edit**, or draft, state. Only one **In Edit** version can exist.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Assessments**.  
The list of assessments is displayed.
3. Click the Actions menu of the assessment, and click **Edit**. The **Edit Assessment** page opens.

4. Update the name of the assessment and the description, as needed.

Descriptions can be up to 500 characters long.

5. If applicable, in the **External System Reference** field, associate an external system reference with the assessment record that you are updating. Enter a unique reference number of up to 20 alphanumeric characters.

When sending an assessment as an API attribute, the external system identifies the assessment by its external system reference.

6. In the **Display History Across Programs** field, enter the time period (in days) in which to display historical completed assessments to the care team.

This option restricts the historical completed assessments that are available to a care team before they complete the assessment on a program, when the assessment was previously completed for the client on another program. For example, if you enter 0, no completion history prior to the program assignment date is displayed when the care team access the assessment from the new program. If you enter 10, the completion history for the previous 10 days (program assignment date - 10 days) is displayed when the care team access the assessment on a new program. **Note:** Depending on the value that you enter, some or all historical versions of the assessment might be unavailable to the care team until they complete the assessment for the first time on the program. When completed, all historical versions of the assessment are displayed.

7. You can select the **Prefill Answers** check box to prefill the assessment answers with the most recent answers when care teams repeat the assessment. You can override this configuration at the question level in the configured assessment.

8. Click **Save**.

After you finish configuring an assessment version, you must activate the version to make the assessment available for use.

## Copying assessments

You can copy an assessment that is in an **Active** state so you can reuse elements of the existing assessment when configuring another similar assessment.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Assessments**.

The list of assessments is displayed.

3. Click the Actions menu of the assessment, and click **Copy**. The **Copy Assessment** page opens. The Copy option is available for the latest active version of the assessment. If there is no active version, then the Copy option is not enabled.

4. Update the name of the assessment and the description, as needed.

Description is pre-populated with the value from the original assessment and can be up to 500 characters long. The Name value is per-populated from the original assessment with the word 'copy' appended.

5. If applicable, in the **External System Reference** field, associate an external system reference with the assessment record that you are updating. Enter a unique reference number of up to 20 alphanumeric characters.

When sending an assessment as an API attribute, the external system identifies the assessment by its external system reference.

6. Choose an appropriate version type for this assessment. Pre-populated with the value that was selected on the original assessment.

- Choose **Script** if this assessment version is a script that will contain questions and answers.
- Choose **Score Only** if this assessment is configured without a script so that the care team can record an assessment score only. A care team might want to configure a Score Only assessment version if they're conducting a paper-based assessment with a client and only want to record a score for the assessment without running a script in Watson™ Care Manager.

7. **Display History Across Programs** - Pre-populated with the value from the original assessment. You can enter the time period (in days) in which to display historical completed assessments to the care team.

This option restricts the historical completed assessments that are available to a care team before they complete the assessment on a program, when the assessment was previously completed for the client on another program. For example, if you enter 0, no completion history prior to the program assignment date is displayed when the care team access the assessment from the new program. If you enter 10, the completion history for the previous 10 days (program assignment date - 10 days) is displayed when the care team access the assessment on a new program. **Note:** Depending on how your administrator has configured the assessment, some or all historical versions of the assessment may be hidden until the care team completes the assessment for the first time on the program. Once completed, all historical versions of the assessment are displayed.

8. You can select the **Prefill Answers** check box to prefill the assessment answers with the most recent answers when care teams repeat the assessment. You can override this configuration at the question level in the configured assessment. Pre-populated with the value from the original assessment.

9. Click **Save**. Creates a copy of the latest active version of the original assessment. The copy is created as an In Edit version.

After you finish configuring an assessment version, you must activate the version to make the assessment available for use.

## Modifying goals and actions suggestions for assessments

You can edit the suggested goals or actions for assessments.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Assessments**.  
The list of assessments is displayed.
3. Click an assessment.  
The assessment opens.
4. Click the **Suggestions** tab.  
The suggestions list is displayed. Expand measures to see the suggestions.
5. To edit a suggestion, click the **Actions** menu of a suggested goal or action and click **Edit**.
  - For goals, you can edit whether the goal is automatically added to an individual's care plan, and the reason for the suggestion.
  - For actions, you can edit the following details:
    - Select whether the action is automatically added to an individual's care plan. For automatically added actions, you can edit the following details:
      - Select whether you want the action to be added to the plan as open or closed. Add an action as closed when the action is completed by being added to the plan.
      - Select whether you want the action to be assigned to a care team role.
    - Change the associated goal.
    - Change the reason for the suggestion.

## Removing goals and actions suggestions from assessments

You can remove a suggested goal or action from an assessment.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Assessments**.  
The list of assessments is displayed.
3. Click an assessment.  
The assessment opens.
4. Click the **Suggestions** tab.  
The suggestions list is displayed. Expand measures to see the suggestions.
5. Click the **Actions** menu of a measure, goal, or action and click **Remove**.
6. Click **Remove** to confirm.

- For measures, all associated suggestions are removed.
- For goals or actions, the suggestion is removed.

## Deleting assessments

You can delete an assessment or an in-edit assessment version.

You can delete an in-edit assessment version, but not the active version.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Assessments**.  
The list of assessments is displayed.
3. Choose one of the following options:
  - a. To delete an assessment, click **Delete** in the **Actions** menu of the assessment.
  - b. To delete an in-edit assessment version, expand the assessment to see the versions, and click **Delete** in the **Actions** menu of an in-edit assessment version.

## Configuring questionnaires

You can view the questionnaires that are defined in the application, create and manage existing questionnaires, and add new questionnaires.

### Creating questionnaires

Questionnaires are versioned so that you can work on questionnaires without affecting the current active version. When you create a questionnaire, a draft version of the questionnaire is automatically created.

Draft questionnaire versions are in an **In Edit** state and the current active versions are in an **Active** state. You can configure only a version of a questionnaire that is in the **In Edit**, or draft, state. Only one **In Edit** version can exist.

You can associate an external system reference with the report template that you are creating or copying. When sending or receiving a questionnaire as an API attribute, the external system identifies the questionnaire by its external system reference.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Questionnaires**. The list of questionnaires is displayed. The **External System Reference** displays the reference that the external system uses to identify the questionnaire.
3. Click **New**.

4. Enter a name for the questionnaire and a description, as needed.  
Descriptions can be up to 500 characters long.
5. Optional: In the **External System Reference** field, enter a unique reference number of up to 20 alphanumeric characters to associate with the questionnaire that you are adding.
6. In the **Display History Across Programs** field, enter the time period (in days) in which to display historical completed questionnaires to the care team.  
This option restricts the historical completed questionnaires that are available to a care team before they complete the questionnaire on a program, when the assessment was previously completed for the client on another program. For example, if you enter 0, no completion history prior to the program assignment date is displayed when the care team access the questionnaire from the new program. If you enter 10, the completion history for the previous 10 days (program assignment date - 10 days) is displayed when the care team access the questionnaire on a new program. **Note:** Depending on the value that you enter, some or all historical versions of the questionnaire might be unavailable to the care team until they complete the questionnaire for the first time on the program. When completed, all historical versions of the questionnaire are displayed.
7. You can select the **Prefill Answers** check box to prefill all questionnaire answers with the most recent answers when care teams repeat the questionnaire. You can override this configuration at the question level in the configured questionnaire.
8. Click **Save**.

After you finish configuring a questionnaire version, you must activate the version to make the questionnaire available for use.

## Configuring questionnaire question scripts

You can script the questions and answers for a questionnaire, and configure their sequence and answer type. You can also add an attribution for the questionnaire, if required.

The **Questions** section of the **Script** tab contains the questionnaire questions and answer types, and indicates whether the questions are optional or conditionally displayed. You can expand the row to see question information. If the answer type is user-defined, the answer options are also displayed here.

In the **Clusters** section, you can view questionnaire clusters, which are used for layout purposes. You can expand a row to view the questions that are associated with each cluster.

## Configuring questionnaire questions

You can add questionnaire questions and flag a question to make it optional or conditional. You can edit and delete questions.

## Adding questionnaire questions

Create the questionnaire questions, associate them with the correct answer types, and configure them as optional or conditional. You can use color to emphasize questions or information, and you can provide links to external websites for more information.

It is important to enter the questions in the correct sequence. Questions are displayed in the order that you enter them. You must enter conditional questions directly after the questions that call them. To call conditional questions, you must choose a user-defined answer type. The default answer types cannot be used to call conditional questions.

You can enter up to 100 questions, and you can use color to highlight the importance of certain questions or information in the questionnaire.



### Important:

If your organization interacts with individuals who are visually impaired, do not use color to highlight the importance of the question or information. State the importance of the question or information in the text.

For each question, you can see the answer type and whether the question is optional or conditional.

You can expand a question to see more details. For user-defined answer types, the answer options are displayed.

For each question, you can configure up to three hyperlinks to external websites so that a care team can link individuals to supplementary reference information.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Questionnaires**.

The list of questionnaires is displayed.

3. Expand a questionnaire. The questionnaire versions are displayed.

4. Open a draft version.
  - If an **In Edit** version exists, click the questionnaire name to open the in-edit version.
  - If no **In Edit** version exists, select **New Version** from the **Actions** menu of the questionnaire to create an in-edit version.

The questionnaire's **Script** tab is displayed.

5. Click **New Question** to create a question.

The **New Questions** page opens.

- a. Enter the text for the question.
- b. From the **Question Color** list, choose the color in which to display the question text for added emphasis.  
Text color defaults to black. You can change the color.
- c. Select options as needed:
  - From the **Answer Type** list, choose **Check Box**, **Date**, **Decimal**, **Multiple Line Text**, **Number**, **Text**, **Text (No Answer)**, or a user-defined answer type. **Multiple Line Text** fields have a limit of 4000 characters.  
A user-defined answer type consists of the answer options and the display type. The display type defines how the options are displayed, for example, as radio buttons. Only user-defined answer types can be used to call conditional questions.
  - **Prefill Answer** - If you select **Prefill Answers** when you create the questionnaire, by default all answers to the questionnaire questions are prefilled with the most recent responses when care teams repeat the questionnaire. You can override the questionnaire level configuration for the answer to this question if needed. You can choose to always prefill the answer to this question, never prefill the answer to this question, or choose the questionnaire configuration. If you choose the questionnaire configuration, the answer to this question will be prefilled (if previously answered) or not based on the questionnaire configuration. Your selection is effective the next time care teams repeat the questionnaire.
  - **Optional** makes the question optional. Clear the check box to make the question mandatory.
  - **Conditional** makes the question display only if a client answers in a certain way to a previous question that drives the condition. (You associate a conditional question with a specific question. Go to the **Conditions** tab to associate the conditional question with a principal question.)
- d. Enter information about the question, as needed.
- e. From the **Information Color** list, choose the color in which to display the informational text for added emphasis.
- f. In each **Reference URL** field, provide a link to an external website that contains supplementary reference information. Enter the hyperlink in this format: `https://www.example.com`.

The hyperlinks that you define to support a question are displayed in plain text and are not clickable. To the care team, the links display as clickable links.

- g. Select **Add** to add each question and **Save** to save your questions when complete.  
Questions are displayed in the order that you enter them.

## Adding read-only instructional text to a questionnaire

When running a questionnaire with a client, the care team might need read-only instructional text to be displayed in any sequence on the questionnaire. You can configure a questionnaire to include instructional text in the place of a question, and specify that no answer is required of the client.

For example, suppose that a client with diabetes need not answer some questions in the questionnaire because those questions don't apply to individuals with that medical condition. In the place of a question in the script, you can specify the read-only instructional text to inform the client about which questions to skip.

No answer type is required to follow the instructional text that you specify.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Questionnaires**.  
The list of questionnaires is displayed.
3. Expand a questionnaire. The questionnaire versions are displayed.
4. Open a draft version.
  - If an **In Edit** version exists, click the questionnaire name to open the in-edit version.
  - If no **In Edit** version exists, select **New Version** from the **Actions** menu of the questionnaire to create an in-edit version.  
The questionnaire's **Script** tab is displayed.
5. Click **New Question** in the drop-down menu to open the **New Questions** page.
  - a. In the **Question** field, enter the read-only instructional text instead of a question.
  - b. From the **Answer Type** list, choose **Text (No Answer)**.
  - c. Select **Optional** because the answer type of **Text (No Answer)** means that a client's answer is not mandatory.
  - d. Enter information about the instructional text, as needed.
  - e. Select **Add** to add the read-only text and **Save** to save the assessment when complete.
6. **Optional:** Select **Validate** to validate the questionnaire version.

## Editing questionnaire questions

You can update the questions or information in a questionnaire, and reorder the sequence in which the questions are displayed. You can use color to emphasize questions or information, and you can provide links to external websites for more information.

It is important to enter the questions in the correct sequence. Questions are displayed in the order that you enter them. You must enter conditional questions directly after the questions that call them. To call conditional questions, you must choose a user-defined answer type. The default answer types cannot be used to call conditional questions.

You can enter up to 80 questions, and you can use color to highlight the importance of certain questions or information in the questionnaire.



### Important:

If your organization interacts with individuals who are visually impaired, do not use color to highlight the importance of the question or information. State the importance of the question or information in the text.

For each question, you can see the answer type and whether the question is optional or conditional.

You can expand a question to see more details. For user-defined answer types, the answer options are displayed.

For each question, you can configure up to three hyperlinks to external websites so that a care team can link individuals to supplementary reference information.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Questionnaires**.

The list of questionnaires is displayed.

3. Expand a questionnaire. The questionnaire versions are displayed.

4. Open a draft version.
  - If an **In Edit** version exists, click the questionnaire name to open the in-edit version.
  - If no **In Edit** version exists, select **New Version** from the **Actions** menu of the questionnaire to create an in-edit version.

The questionnaire's **Script** tab is displayed.

5. Select **Edit** in the **Actions** menu of any row in the **Questions** section.

The **Edit Question** page opens.

- Modify the question text, and to emphasize a question as important, from the **Question Color** list, choose the color in which to display the question.
- Modify the answer type for the question. Available answer types are **Check Box, Date, Decimal, Multiple Line Text, Number, Text, Text (No Answer)**, or user-defined answer types.

A user-defined answer type consists of the answer options and the display type. The display type defines how the options are displayed, for example, as radio buttons. Only user-defined answer types can be used to call conditional questions.

- If you selected **Prefill Answers** when you created the questionnaire, by default all answers to the questionnaire questions are prefilled with the most recent responses when care teams repeat the questionnaire. The **Prefill Answer** option allows you to override the questionnaire level configuration for the answer to this question if needed. You can choose to always prefill the answer to this question, never prefill the answer to this question, or choose the questionnaire configuration. If you choose the questionnaire configuration, the answer to this question will be prefilled (if previously answered) or not based on the questionnaire configuration. Your selection is effective the next time care teams repeat the questionnaire.
- **Optional** makes the question optional. Clear the check box to make the question mandatory.
- **Conditional** makes the question display only if a client answers in a certain way to a previous question that drives the condition. (You associate a conditional question with a specific question. Go to the **Conditions** tab to associate the conditional question with a principal question.)
- Modify information about the question, and to emphasize information as important, from the **Information Color** list, choose the color in which to display the information.
- In each **Reference URL** field, provide a link to an external website that contains supplementary reference information. Enter the hyperlink in this format: `https://www.example.com.`

The hyperlinks that you define to support a question are displayed in plain text and are not clickable. To the care team, the links display as clickable links.

6. To reorder the sequence of questions in the questionnaire, click **Reorder Questions** in the drop-down menu to open the **Reorder Questions** page. Drag and drop the questions to position them in your preferred order.

## Editing read-only instructional text in a questionnaire

When running a questionnaire with a client, the care team might need read-only instructional text to be displayed in any sequence on the questionnaire. You can update a questionnaire to include instructional text in the place of a question, with no answer required of the client by design.

For example, suppose that a client with diabetes need not answer some questions in the questionnaire because those questions don't apply to individuals with that medical condition. In the place of a question in the script, you can specify the read-only instructional text to inform the client about which questions to skip.

No answer type is required to follow the instructional text that you specify.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Questionnaires**.  
The list of questionnaires is displayed.
3. Expand a questionnaire. The questionnaire versions are displayed.
4. Open a draft version.
  - If an **In Edit** version exists, click the questionnaire name to open the in-edit version.
  - If no **In Edit** version exists, select **New Version** from the **Actions** menu of the questionnaire to create an in-edit version.The questionnaire's **Script** tab is displayed.
5. Click **Edit** in the **Actions** menu of the instructional text entry to open the **Edit Question** page.
6. In the **Question** field, update the details of the instructional text as needed.
7. From the **Answer Type** list, select **Text (No Answer)**.
8. Select **Optional** because the answer type of **Text (No Answer)** means that a client's answer is not mandatory.
9. Select **Add** to add the updated text and **Save** to save the questionnaire when complete.
10. **Optional:** Select **Validate** to validate the questionnaire version.

## Deleting questionnaire questions

You can delete a questionnaire.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Questionnaires**.  
The list of questionnaires is displayed.
3. Expand a questionnaire. The questionnaire versions are displayed.

4. Open a draft version.
  - If an **In Edit** version exists, click the questionnaire name to open the in-edit version.
  - If no **In Edit** version exists, select **New Version** from the **Actions** menu of the questionnaire to create an in-edit version.
- The questionnaire's **Script** tab is displayed.
5. Click **Delete** in the **Actions** menu of any row in the **Questions** section to remove the selected question.
6. **Optional:** Select **Validate** to validate the questionnaire version.

## Configuring user-defined answer types for questionnaire answers

In addition to the default answer types, you can configure user-defined answer types for your questionnaire answers. You must create the answer types, define the associated answer options, and define how the answer options are displayed. You can edit or delete user-defined answer types, and associate answer types with questions.

You can define answer types Drop down, Multiple Select and Radio Button. You can define answer values for each of these types.

The following default answer types are available.

- Check Box
- Date
- Decimal
- Multiple Line
- Number
- Text

For other answers, create your own user-defined answer types. A user-defined answer type consists of the answer options and the display type. The display type defines how the options are displayed, for example, as radio buttons. Only user-defined answer types can be used to call conditional questions.

The **Answers** section shows the user-defined answer types that are configured for the questionnaire. You can view the answer types and the associated answers.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Questionnaires**.  
The list of questionnaires is displayed.
3. Expand a questionnaire. The questionnaire versions are displayed.

4. Open a draft version.

- If an **In Edit** version exists, click the questionnaire name to open the in-edit version.
- If no **In Edit** version exists, select **New Version** from the **Actions** menu of the questionnaire to create an in-edit version.

The questionnaire's **Script** tab is displayed.

5. Create an answer type and associated answers for use in the questionnaire.

- a. Select **New Answer Type** in the drop-down menu to open the **New Answer Type** page.

- b. Enter a name.

- c. Select the display type for the answer options.

The available display types are drop-down list, multiple selection list, or radio button.

- d. Enter the answer texts (200 characters maximum) for each answer option in the order that you want them to display, and click **Add**.

- The **Answer** text is visible to the user when they run the questionnaire.
- Available answers include **Yes**, **No**; and **Never**, **Sometimes**, **Always**.

- e. Click **Save** to create the answer type.

The answers are displayed in the order that you enter them.

6. To reorder the sequence of answers in the questionnaire, click **Reorder Answers** in the **Actions** menu of any answer. In the **Reorder Answers** page, drag and drop the answers to position them in your preferred order.

7. Do the following tasks in the **Actions** menu of rows in the **Answers** section.

- You can make these selections in an **Answer Type** row.

- Click **Associate with Questions** to select multiple questions to associate with the answer type.
- Click **Edit**. The **Edit Answer Type** page is displayed. Modify name or type, and add answers, as needed.
- Click **Delete**. When you delete an answer type, the associated answers are deleted. The association with questions is also removed.

- In an **Answer** row, Click **Edit** or **Delete**.

8. **Optional:** Select **Validate** to validate the questionnaire version.

## Configuring questionnaire attributions

You can view, add, and edit attribution details that are associated with an questionnaire. The **Attribution** section displays the attribution or copyright text for the questionnaire.

1. Sign in with your administrator credentials.  
Your home page opens.
  2. Click **Questionnaires**.  
The list of questionnaires is displayed.
  3. Expand a questionnaire. The questionnaire versions are displayed.
  4. Open a draft version.
    - If an **In Edit** version exists, click the questionnaire name to open the in-edit version.
    - If no **In Edit** version exists, select **New Version** from the **Actions** menu of the questionnaire to create an in-edit version.
- The questionnaire's **Script** tab is displayed.
5. Select **Edit Attribution** from the **Actions** menu.  
The **Edit Attribution** page opens.
  6. Enter the attribution text and save it.  
An attribution can specify the source patient health questionnaire, as in this example:

“Developed by Doctors Robert L. Spitzer, Janet B.W. Williams, Kurt Kroenke, and colleagues, with an educational grant from Pfizer, Inc.”

## Configuring questionnaire clusters

You can add, edit, and delete clusters to configure the layout of questionnaires.

You can use color to highlight the importance of information in the cluster.



### Important:

If your organization interacts with individuals who are visually impaired, do not use color to highlight the importance of information. State the importance of the information in the text.

1. Sign in with your administrator credentials.  
Your home page opens.
  2. Click **Questionnaires**.  
The list of questionnaires is displayed.
  3. Expand a questionnaire. The questionnaire versions are displayed.
  4. Open a draft version.
    - If an **In Edit** version exists, click the questionnaire name to open the in-edit version.
    - If no **In Edit** version exists, select **New Version** from the **Actions** menu of the questionnaire to create an in-edit version.
- The questionnaire's **Script** tab is displayed.

5. Click **New Cluster**.

The **New Cluster** page opens.

- a. Give the cluster a title and select **Display Title** if you want users to see the title when they use the questionnaire.
- b. Enter more information about the questionnaire, if needed.
- c. From the **Information Color** list, choose the color in which to display informational text for added emphasis.
- d. Select questions to associate with the cluster.
  - Only questions that are not conditional are available to select.
  - Whenever you add a parent question to a cluster, all of the parent's child questions are added.

6. Do the following tasks in the **Actions** menu of any row in the **Clusters** section.

- Click **Edit** to open the **Edit Cluster** page.
    - a. You can update the cluster title.
    - b. Select or clear the **Display Title** option to control whether users see the title when they use the questionnaire.
    - c. Enter more information about the questionnaire, if needed.
    - d. From the **Information Color** list, choose the color in which to display informational text for added emphasis.
    - e. Select questions to associate with the cluster.
      - Only questions that are not conditional are available to select.
      - Whenever you add a parent question to a cluster, all of the parent's child questions are added.
  - Click **Delete** to remove the selected cluster.
7. To remove a question from the cluster, click **Remove** in the **Actions** menu of any question row in the **Clusters** section.
- If the question is included in a condition, any conditional questions that are linked to it are also removed.
8. **Optional:** Select **Validate** to validate the questionnaire version.

## Configuring conditional questions for questionnaires

You can configure extra conditional questions to display in response to client answers in a questionnaire. To do this, you must create a condition that associates the conditional questions with a specific question and answer.

Before you can create conditions, you must configure at least one non-conditional question and one conditional question on your questionnaire. The order of the questions in the questionnaire is important, the conditional question must follow the question with no other questions between them. A conditional question can call another conditional question, again only when it is next in order. Only questions that have user-defined answer types and that are on the currently selected questionnaire are available.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Questionnaires**.

The list of questionnaires is displayed.

3. Expand a questionnaire. The questionnaire versions are displayed.

4. Open a draft version.

- If an **In Edit** version exists, click the questionnaire name to open the in-edit version.
- If no **In Edit** version exists, select **New Version** from the **Actions** menu of the questionnaire to create an in-edit version.

The questionnaire's **Script** tab is displayed.

5. Click the **Conditions** tab.

The list of conditions is displayed.

6. Click **New**.

The configuration wizard is displayed. The first wizard page lists the questions that exist in the questionnaire.

- a. Select a question, and click **Next**.
- b. Select the answer that will drive the condition, and click **Next**.
- c. Select the conditional questions to associate with your question-answer pairs. You see only the questions that immediately follow the parent question.
- d. Click **Save**.

7. Manage conditional questions as follows.

- Click the **Add Conditional Questions** action to add more questions to a condition. An informational message displays if no more conditional questions are available to add. Irrespective of the number of questions, the maximum number of conditions that can be configured is 250.
- Click the **Remove** action on a question-answer pair to remove the question, answers, and all associated conditional questions from the list.
- Click the **Remove** action on a conditional question to remove the conditional question from the list.

8. **Optional:** Select **Validate** to validate the questionnaire version.

## Suggesting goals and actions based on questionnaire results

You can configure goals and actions to be suggested for an individual's care plan based on specific questionnaire responses.

You can add suggestions only for questions with user-defined or text answer types. Repeat the procedure to generate multiple suggestions for the same question and answer.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Questionnaires**.

The list of questionnaires is displayed.

3. Click a questionnaire.

The questionnaire opens.

4. Click the **Suggestions** tab.

The suggestions list is displayed.

5. To add a suggestion, click **Suggest**.

The **Suggest** wizard opens and displays any questions in the questionnaire that have user-defined or text answer types.

- a. Select a question and click **Next**.

- b. Select the answers that you want to generate the suggestions and click **Next**.

- c. Select the suggestion.
  - **Goal** - Search for and select a goal that you want to suggest.
  - **Action** - Search for and select an action to suggest for the goal.
  - **Reason** - Enter a reason for the suggestions, as needed.

- d. Click **Save**.

## Generating goals and actions suggestions based on questionnaire results

You can configure goal and action suggestions to be automatically added to an individual's care plan based on specific questionnaire responses.

You can automatically add suggestions only for questions with user-defined answer types or text answer types. You can generate multiple suggestions for a single question and answer by running the wizard again.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Questionnaires**.

The list of questionnaires is displayed.

3. Click a questionnaire.

The questionnaire opens.

4. Click the **Suggestions** tab.

The suggestions list is displayed.

5. To add a suggestion, click **Automatically Add**.

The **Automatically Add** wizard opens and displays any questions in the questionnaire that have user-defined or text answer types.

a. Select a question and click **Next**.

b. Select the answers that you want to generate the suggestions and click **Next**.

c. Select the suggestions.

- **Goal** - Search for and select the goal.
- **Action** - Search for and select an action. If you select an action, you must select a goal.
- **Action Status** - Select a status of open or completed for a suggested action. You can select to have actions automatically added as completed for any actions that care teams complete by completing an questionnaire so that care team members do not have to manually add and complete them. For example, a completed action of “*Call individual to discuss program*” might be added when the care team finishes running an outreach questionnaire.
- **Assign Action to Role** - By default, client actions are assigned to the individual and care team actions are assigned to the user who completed the questionnaire. You can assign care team actions to a specific care team role. The care team actions are added to the unassigned list for users with that care team role who can accept and complete the actions. Only care team roles that are currently assigned to users are available for selection.
- **Reason** - You can enter a suggestion reason.

d. Click **Save**.

## Generating tasks from questionnaire results

You can configure a task to be automatically created for users based on specific questionnaire responses.

Tasks can be generated only for questions with user-defined answer types or text answer types. You can generate multiple tasks for a single question and answer by running the wizard again.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Questionnaires**.

The list of questionnaires is displayed.

3. Click a questionnaire.

The questionnaire opens.

4. Click the **Tasks** tab.

The tasks for the questionnaire are displayed.

5. Choose the appropriate option.

- Add a task to a questionnaire.

- a. Click **Add Task**. The **Add Task** wizard opens and displays the questions in the questionnaire that have user-defined or text answer types.
- b. Select a question and click **Next**.
- c. Click the Search icon, search for and select the task that you want to create, and click **Select**.
- d. From the **Tasks Status** list, set the task to be created as **Open** or **Closed**. By default, tasks are created as open. You might record tasks that were completed while a client was progressing through the questionnaire as closed.
- e. From the list of available care team roles, select a role to assign the task to. Only care team roles that are currently assigned to users are available to choose.

Tasks are added to the unassigned list for users with that care team role who can accept and complete the task. If you do not select a role, the task is assigned to the user who completed the questionnaire.

- f. Select the answers that you want to generate the task.

- g. Click **Save**. Each question and answer for which you configure an automatic task is listed.

- Remove all automatic tasks for a specific question and answer by clicking the **Actions** menu of the question and answer, and selecting **Remove**.
- Remove an automatic task for a specific question and answer by clicking the **Actions** menu of the task, and selecting **Remove**.

#### Related information

[Configuring tasks \(on page 136\)](#)

## Generating alerts from questionnaire results

You can configure an alert to be automatically created for users based on specific questionnaire responses.

Alerts can be generated only for questions with user-defined answer types or text answer types. You can generate multiple alerts for a single question and answer by running the wizard again.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Questionnaires**.

The list of questionnaires is displayed.

3. Click a questionnaire.

The questionnaire opens.

4. Click the **Alerts** tab.

The alerts for the questionnaire are displayed.

5. Choose the appropriate option.

- Add an alert to a questionnaire.

- a. Click **Add Alert**. The **Add Alert** wizard opens and displays the questions in the questionnaire that have user-defined or text answer types.
- b. Select a question and click **Next**.
- c. From the list of available alerts, select one that you want to create.
- d. Select a **Priority** value.
- e. Optionally, enter a note.
- f. Optionally, select **Care Team** or leave blank. If **Care Team** is selected, all individuals who are Care Team members at the time of the questionnaire completion are notified of the alert. If **Care Team** is not selected, the alert will appear on the clients context pane.
- g. Select the answers that you want to generate the alert.
- h. Click **Save**. Each question and answer for which you configure an automatic alert is listed.

- Remove all automatic alerts for a specific question and answer by clicking the **Actions** menu of the question and answer, and selecting **Remove**.
- Remove an automatic alert for a specific question and answer by clicking the **Actions** menu of the alert, and selecting **Remove**.

## Activating questionnaires

When you finish working on a questionnaire, you must activate your draft version to make your changes available for use. Validate the questionnaire version and correct any issues before you activate it.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Questionnaires**.

The list of questionnaires is displayed.

3. Click the questionnaire.

The draft in-edit version of the questionnaire opens.

4. Select **Validate** in the menu to validate the questionnaire version.

5. Select **Activate** in the menu to activate the questionnaire version.

By setting the **Effective From** date, you can specify a date in the future when care teams can start to use the new version.

6. In the activation modal, enter comments that describe your changes to the version, and then click **Yes**.

The comments are displayed with the version's activation date in the questionnaire's Details cluster.

## Modifying questionnaires

You can update a questionnaire that is in an **In Edit**, or draft, state. Only one **In Edit** version can exist.

You can rename a questionnaire and if not previously configured, you can associate a new external system reference with the questionnaire. When sending or receiving a questionnaire as an API attribute, the external system identifies the questionnaire by its external system reference. If you update an existing external system reference that was previously configured and is already in use in existing integrations, you might cause existing integrations to fail.

In addition, if you modify an external system reference that is associated with a questionnaire, you cannot reuse the old external system reference when configuring other questionnaires.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Questionnaires**.

The list of questionnaires is displayed.

3. Click the Actions menu of the questionnaire, and click **Edit**. The **Edit Questionnaire** page opens.

4. Update the name of the questionnaire and the description, as needed.

Descriptions can be up to 500 characters long.

5. In the **External System Reference** field, enter a unique reference number of up to 20 alphanumeric characters.

6. In the **Display History Across Programs** field, enter the time period (in days) in which to display historical completed questionnaires to the care team.

This option restricts the historical completed questionnaires that are available to a care team before they complete the questionnaire on a program, when the assessment was previously completed for the client on another program. For example, if you enter 0, no completion history prior to the program assignment date is displayed when the care team access the questionnaire from the new program. If you enter 10, the completion history for the previous 10 days (program assignment date - 10 days) is displayed when the care team access the questionnaire on a new program. **Note:** Depending on the value that you enter, some or all historical versions of the questionnaire might be unavailable to the care team until they complete the questionnaire for the first time on the program. When completed, all historical versions of the questionnaire are displayed.

7. You can select the **Prefill Answers** check box to prefill all questionnaire answers with the most recent answers when care teams repeat the questionnaire. You can override this configuration at the question level in the configured questionnaire.

8. Click **Save**.

After you finish configuring a questionnaire version, you must activate the version to make the questionnaire available for use.

## Copying questionnaires

You can copy a questionnaire that is in an **Active** state so you can reuse elements of the existing questionnaire when configuring another similar questionnaire.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Questionnaires**.

The list of questionnaires is displayed.

3. Click the Actions menu of the questionnaire, and click **Copy**. The **Copy Questionnaire** page opens.

The Copy option is available for the latest active version of the questionnaire. If there is no active version, then the Copy option is not enabled.

4. Update the name of the questionnaire and the description, as needed.

Description is pre-populated with the value from the original questionnaire and can be up to 500 characters long. The Name value is pre-populated from the original questionnaire with the word 'copy' appended.

5. If applicable, in the **External System Reference** field, associate an external system reference with the questionnaire record that you are updating. Enter a unique reference number of up to 20 alphanumeric characters.

When sending a questionnaire as an API attribute, the external system identifies the questionnaire by its external system reference.

6. Choose an appropriate version type for this questionnaire. Pre-populated with the value that was selected on the original questionnaire.

- Choose **Script** if this questionnaire version is a script that will contain questions and answers.
- Choose **Score Only** if this questionnaire is configured without a script so that the care team can record a questionnaire score only. A care team might want to configure a Score Only questionnaire version if they're conducting a paper-based questionnaire with a client and only want to record a score for the questionnaire without running a script in Watson™ Care Manager.

7. **Display History Across Programs** - Pre-populated with the value from the original questionnaire.

You can enter the time period (in days) in which to display historical completed questionnaires to the care team.

This option restricts the historical completed questionnaires that are available to a care team before they complete the questionnaire on a program, when the questionnaire was previously completed for the client on another program. For example, if you enter 0, no completion history prior to the program assignment date is displayed when the care team access the questionnaire from the new program. If you enter 10, the completion history for the previous 10 days (program assignment date - 10 days) is displayed when the care team access the questionnaire on a new program. **Note:** Depending on how your administrator has configured the questionnaire, some or all historical versions of the questionnaire may be hidden until the care team completes the questionnaire for the first time on the program. Once completed, all historical versions of the questionnaire are displayed.

8. You can select the **Prefill Answers** check box to prefill all questionnaire answers with the most recent answers when care teams repeat the questionnaire. You can override this configuration at the question level in the configured questionnaire.
9. Click **Save**. Creates a copy of the latest active version of the original questionnaire. The copy is created as an In Edit version.

After you finish configuring a questionnaire version, you must activate the version to make the questionnaire available for use.

## Sharing questionnaires with external systems

You can set sharing options to share *Completed* client questionnaires between Watson™ Care Manager and external systems (via an API) so that users of both systems have the client's latest questionnaire information. Download the API document for a shared questionnaire and distribute it to the systems integrator for your organization so that they can update integrations to use the latest version of the questionnaire. You can stop sharing a questionnaire to prevent the sharing of its data with external systems.

## Sharing questionnaire versions

You can allow questionnaire sharing with a system external to Watson™ Care Manager, for example, a hospital information system.

Ensure that you associate an external system reference with the questionnaire. The external system reference is required so that the external system can uniquely identify the questionnaire when it is sent between Watson™ Care Manager and the external system.

In addition, ensure that you configure source and original source systems for questionnaires. Source and original source systems values confirm where questionnaires come from. For more information, see [Configuring data sources \(on page 195\)](#).

External systems can retrieve completed questionnaires from Watson™ Care Manager that they are notified about. The completed questionnaires are shared from Watson™ Care Manager through the Questionnaires API. For Watson™ Care Manager to send a notification to the external system when the questionnaire is completed by care teams, you must subscribe to notifications about the Questionnaire data type by [Subscribing to notifications \(on page 286\)](#).

You can share only **Active** questionnaires. When you share a version of a questionnaire, Watson™ Care Manager automatically stops sharing any existing version that is already shared.

After you share a questionnaire version, you can share its API document with the systems integrator for your organization.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Questionnaires**.  
The list of questionnaires is displayed.
3. Expand a questionnaire
4. Click the **Actions** menu of an **Active** questionnaire version, and select **Share**.  
The **Share Questionnaire Version** page opens.
5. Click **Share** to share the questionnaire version.

[Sharing the API document for a questionnaire \(on page 77\)](#)

## Sharing the API document for a questionnaire

When you share a questionnaire, Watson™ Care Manager generates an API document in JSON format. You can download the document to share with the relevant integrator for your organization.

The API document contains the REST API calls and structure that Watson™ Care Manager requires for external systems to share completed client questionnaires with Watson™ Care Manager and for Watson™ Care Manager to share completed client questionnaires with external systems. Your integrator uses the API document to understand what data is expected from the receiving system and the format of the data.



### Note:

The option to download an API document for a questionnaire version is available only when a questionnaire version is **Active** and shared. The API document is compatible only with Version 2.0 of the Swagger Editor.



### Important:

Whenever you modify or create a new version of a questionnaire that is shared with external systems, you may need to redistribute its API document to your organization's integrator. Otherwise, existing integrations might fail.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Questionnaires**.  
The list of questionnaires is displayed.

3. From the **Actions** menu for an **Active** questionnaire that is shared, click **Share Document** to download its API document.
4. Click **Download**.
5. Browse to where you want to store the file on your computer.
6. Distribute the document to the systems integrator for your organization.

## Stopping questionnaire sharing

You can stop sharing a questionnaire version to prevent sharing of client information captured in respect of the version with external systems.

If you stop sharing a questionnaire version that is already in use in existing integrations, you might cause existing integrations to fail. Client information that is recorded in respect of the questionnaire will no longer be shared between Watson™ Care Manager and external systems.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Questionnaires**. The list of questionnaires is displayed.
3. Expand a questionnaire.
4. Click the **Actions** menu of an **Active** questionnaire version, and select **Stop Sharing**.  
The **Stop Sharing Questionnaire Version** page opens.
5. Click **Stop Sharing** to stop sharing the questionnaire version with external systems.

## Updates to questionnaires and external systems

Occasionally, you might need to create a new version of a questionnaire or modify an existing version. If the questionnaire is shared with an external system, some updates require you to redistribute its API document to your organization's integrator.



### Important:

If your changes impact existing integrations, you must follow your organization's internal process to make the latest version of the questionnaire API document available to your organization's integrator. Your integrator uses the document to sync the information that is captured in respect of your latest questionnaire version with the external system.

### Which questionnaire updates impact integrations?

The table lists the updates that you can make when you modify a questionnaire and whether they impact existing integrations.

**Table 2. Questionnaire updates**

<b>Category</b>	<b>Update</b>	<b>Does this update impact integrations? (Yes/No)</b>	<b>More information</b>
Layout	Adding, updating, or deleting clusters	No	<a href="#">Configuring questionnaire clusters (on page 66)</a>
Questions	Adding a mandatory question	Yes	<a href="#">Adding questionnaire questions (on page 58)</a>
	Deleting a mandatory question	Yes	<a href="#">Deleting questionnaire questions (on page 63)</a>
	Adding an optional question	No	<a href="#">Adding questionnaire questions (on page 58)</a>
	Deleting an optional question	No	<a href="#">Deleting questionnaire questions (on page 63)</a>
	Adding a conditional question	No	<a href="#">Adding questionnaire questions (on page 58)</a>
	Deleting a conditional question	No	<a href="#">Deleting questionnaire questions (on page 63)</a>
Versioning	Configuring one version of a questionnaire for display in Watson™ Care Manager and a different version for integration purposes.	No  Do not configure separate versions. Configure only one version of a questionnaire for display in Watson™ Care Manager and for integration purposes.	

## Troubleshooting

If integrations fail because you did not make the API document for a new questionnaire version available to your organization's integrator, stop sharing your new version, then share a previous version of the questionnaire that you know works.

## Modifying goals and actions suggestions for questionnaires

You can edit the suggested goals or actions for a questionnaire.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Questionnaires**.  
The list of questionnaires is displayed.
3. Click a questionnaire.  
The questionnaire opens.
4. Click the **Suggestions** tab.  
The suggestions list is displayed. Expand questions to see the suggestions.
5. To edit a suggestion, click the **Actions** menu of a suggested goal or action and click **Edit**.
  - For goals, you can edit whether the goal is automatically added to an individual's care plan, and the reason for the suggestion.
  - For actions, you can edit the following details:
    - Select whether the action is automatically added to an individual's care plan. For automatically added actions, you can edit the following details:
      - Select whether the action is automatically added to an individual's care plan.
      - For automatically added actions, you can edit the following details:
        - Select whether you want the action to be added to the plan as open or closed. Add an action as closed when the action is completed by being added to the plan.
        - Select whether you want the action to be assigned to a care team role.
    - Change the associated goal.
    - Change the reason for the suggestion.

## Removing goal and action suggestions from questionnaires

You can remove a suggested goal or action from a questionnaire.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Questionnaires**.

- The list of questionnaires is displayed.
3. Click a questionnaire.

The questionnaire opens.
4. Click the **Suggestions** tab.

The suggestions list is displayed. Expand questions to see the suggestions.
5. Click the **Actions** menu of a question, goal, or action, and click **Remove**.
6. Click **Remove** to confirm.
  - For questions, all associated suggestions are removed.
  - For goals or actions, the suggestion is removed.

## Deleting questionnaires

You can delete a questionnaire on the **Questionnaires** page.

1. Sign in with your administrator credentials.

Your home page opens.
2. Click **Questionnaires**.

The list of questionnaires is displayed.
3. Choose one of the following options:
  - Click **Delete** to delete the questionnaire, and then click **Delete** to confirm your choice. The questionnaire is deleted from the **Questionnaires** page and is not available for selection by users.
  - To delete an in-edit questionnaire version, expand the questionnaire to see the versions, and click **Delete** in the **Actions** menu of an in-edit questionnaire version.

## Configuring goals

You can configure a library of goals for use in programs and care plans. A goal is a measurable target that a client can complete to move towards successfully completing a program. You can create, modify, and delete goals. You can tag a goal with multiple focus areas, which are groupings for goals that assist with reporting and evaluation.

## Creating goals

You can create goals for the care team to use in programs and clients' care plans. A goal is a measurable target that a client can complete to move towards successfully completing a program.

1. Sign in with your administrator credentials.

Your home page opens.
2. Click **Care Planning > Goals**.

Existing goals are displayed.

3. Click **New**.

The **New Goal** page opens.

4. Name the goal.



**Tip:**

Enter a name of 3 characters or more to enable searches for the name.

5. Complete the following information.

- a. Select one or more focus areas to associate the goal with.

Focus areas are specific areas of client behavior or activity that a goal is intended to address, for example, Healthy Coping, Being Active, or Safety.

- b. **Description** - Enter the goal description.

- c. In each **Reference URL** field, provide a link to an external website that contains supplementary reference information. Enter the hyperlink in this format: `https://www.example.com`.

The hyperlinks that you define to support a goal are displayed in plain text and are not clickable. To the care team, the links display as clickable links.

6. Click **Save**.

## Configuring focus areas for goals

*Focus areas* are a specific area of client behavior or activity that a goal is intended to address, for example, Healthy Coping, Being Active, or Safety.

Focus areas help an organization to evaluate and report about the types of goals that are in use in care plans. You can reorder the sequence in which focus areas are displayed.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Goals**, and select **Focus Areas**.

The existing focus areas are displayed. The focus areas that come with the product are enabled by default.

3. Click **New** to add a focus area.

4. Manage the display of a focus area by completing the following steps in the **Actions** menu of the focus area:

- Select **Edit** to modify the name of a focus area.
- Select **Show** to make a focus area available for the care team to use.
- Select **Hide** to make a focus area unavailable in the goal library. This hiding of the focus area does not affect any uses of this focus area in existing care plans.
- Select **Reorder** to reorder the sequence of focus areas. Drag and drop the focus areas to position them in your preferred order.

## Configuring outcomes for goals

*Outcomes* are the expected results of a goal, for example **Successful**, or **Abandoned**.

Access the outcomes for a goal to update them, or to verify that they are correct. You can also reorder the sequence in which outcomes are displayed.

1. Sign in with your administrator credentials.

Your home page opens.

2. Select **Care Planning > Goals**, and select **Outcome**.

The existing outcomes are displayed. The outcomes that come with the product are enabled by default and cannot be edited.



### Note:

The list of outcomes applies to both client goals and family goals.

3. Select **New** to add an outcome.

4. Enter a name for the outcome in the **Name** field and select **Save**.

5. Manage the display of an outcome by completing the following steps in the **Actions**  menu of the outcome:

- Select **Edit** to modify the name of an outcome.
- Select **Show** to make an outcome available for the care team to use.
- Select **Hide** to make an outcome unavailable in the goal library. Hiding the outcome does not affect any uses of this outcome in existing care plans.



**Note:**

The **Pending** outcome value is disabled and cannot be used by the care team. If you were to configure the **Pending** goal outcome with a display value of **Shown**, a goal cannot be completed when care team members select **Pending** as the goal.

6. Select **Reorder** to reorder the sequence of outcomes. Then, select the  icon of the outcome that you want to reorder and drag it to a new location on the **Reorder Outcomes** page.

## Configuring action and service suggestions for goals

You can suggest actions, services, and service categories that can help an individual to achieve a goal. When the goal is added to an individual's care plan, the actions, services, and service categories are suggested for the individual.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Goals**.  
The goals library is displayed.
3. Click the **Actions** menu of a goal, and click **Suggest**.  
The **Suggest** page opens.
4. Click the search icon for actions, services, or service categories, enter your search terms and click **Search**.
  - For actions, enter a name or description.
  - For services, enter a name, description, or category.
  - For service categories, enter a name.
5. Select an action, service, or service category in the **Results** list, and click **Select**.
6. **Optional:** Enter a reason for the suggestion of up to 300 characters.
7. Click **Save**.

## Automatically adding actions to care plans

You can configure actions to be automatically added to an individual's care plan when a specified goal is added to their plan.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Goals**.  
The goals library is displayed.

3. Click the **Actions** menu of the goal, and click **Automatically Add**.

The **Automatically Add** page opens.

4. To automatically add an action, complete the following steps:

a. Click the search icon for actions.

b. Enter a name or description and click **Search**.

c. Select an action in the **Results** list, and click **Select**.

d. Use **Action Status** to select whether you want the action to be added to the plan as open or completed.

Add an action as completed when the action is completed by being added to the plan.

e. By default, client actions are assigned to the individual and care team actions are assigned to the user who added the goal. To have care team actions added to the unassigned list of users with a care team role, from the **Assign Action to Role** list, select a specific role. All of the configured care team roles are available for selection irrespective of whether a user is currently assigned to the care team role. Whenever users are assigned to the selected role, they can accept and complete the actions.

f. Enter a reason if required.

g. Click **Save**.

## Modifying goals

You can update a goal in the library of configured goals.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Goals**.

Existing goals are displayed.

3. Click the **Actions** menu of the goal, and click **Edit**.

The **Edit Goal** page opens.

4. **External System Reference**- If applicable, associate an external system reference with the goal that you are creating so that an integrated system can identify the goal when it is sent from Watson™ Care Manager. Enter a unique reference number of up to 20 alphanumeric characters.

When sending an action as an API attribute, the external system identifies the goal by its external system reference.

5. Select one or more focus areas to associate the goal with.

Focus areas are specific areas of client behavior or activity that a goal is intended to address, for example, Healthy Coping, Being Active, or Safety.

6. **Description** - Update the goal description.
7. In each **Reference URL** field, provide a link to an external website that contains supplementary reference information. Enter the hyperlink in this format: <https://www.example.com>.

The hyperlinks that you define to support a goal are displayed in plain text and are not clickable. To the care team, the links display as clickable links.

8. Click **Save**.

## Modifying suggestions for goals

You can edit the suggested actions, services, or service categories for a goal.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Goals**.  
The goals library is displayed.
3. Expand a goal to see the suggestions:
4. Click the **Actions** menu of a suggestion and click **Edit**.
  - For actions, you can edit whether the action is automatically added to an individual's care plan, whether you want the action to be added to the plan as open or closed, whether you want the action to be assigned to a role, or the reason.
  - For services and service categories, you can edit the reason.

## Removing goal suggestions

You can remove a suggested action, service, or service category for a goal.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Goals**.  
The goals library is displayed.
3. Expand a goal to see the suggestions and click the **Actions** menu of a suggestion and click **Remove**.
4. Click **Remove** to confirm.

## Deleting goals

If a configured goal is incorrect or obsolete, you can delete it. Note, however, that if you delete a goal, you also delete any suggested actions that are associated with the goal.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Goals**.

Existing goals are displayed.

3. Click the **Actions** menu of the goal, and click **Delete**.

4. Click **Yes** to confirm that you want to delete the goal.

Deletion does not affect instances of the goal that are already part of a care plan.

## General goals

When care team actions are received from third-party applications, a **General** ad hoc goal is generated and associated with all of the received care team actions. The **General** goal that is generated in this way is not part of the configured library of goals.

If you require it, you can still configure a goal called **General** for the library of configured goals. All care team actions received from third-party applications are associated with this configured goal.

If a care team member has already created an ad hoc goal called **General** on a client's plan and the goal is in the status *In Progress*, then all care team actions received from third-party applications are associated with this goal.

The **General** goal whether configured or ad hoc cannot be modified by a care team member. Care team members can only remove actions from the **General** goal and delete it from a plan once all actions are removed from it.

## Configuring actions

You can configure a library of actions for your organization. You can create, modify, and delete actions, and assign categories to actions to assist with managing various types of actions. Actions must be associated with at least one goal on a care plan. You can add actions to goals to associate them with achieving that goal.

### Creating actions

You can create a library of client or care team actions for use by care teams. For actions that are automatically added, you can set a lead time for the start date, and an expected period for the action.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Actions**.

Existing actions are displayed.

3. Expand an action to see the details of that action.

4. Click **New**.

The **New Action** page opens.

5. Enter a name for the action. You must enter 3 characters or more to enable searches for the name.

6. Complete the following information.

a. **External System Reference**- If applicable, associate an external system reference with the action that you are creating so that an integrated system can identify the action when it is sent from Watson™ Care Manager. Enter a unique reference number of up to 20 alphanumeric characters.

When sending an action as an API attribute, the external system identifies the action by its external system reference.

b. **Responsibility**-

- Select **Client** if the individual who is receiving care is to take the action.
- Select **Care Team Member** if a care team member is to do the work but the action is unassigned to any member.

c. **Category** - Select a category for the action, for example, Appointment, Education, or Reunification.

d. Date settings, which are applied to an action only when you automatically add that action to a goal, assessment, or questionnaire.

- **Start date (Days)** - Set a lead time for starting an action. Enter the number of days after the action is added to the care plan that you want to set the start date, for example, entering 5 means that the start date of the action is 5 days after the action is added to the care plan. If you do not enter a value or if you enter 0, the start date is the day that the action is added to the care plan.
- **Expected End Date (Days)** - Set a expected duration for the action, this is time period in days within which you expect the action to be completed. The expected end date is then calculated by adding the value for **Expected End Date (Days)** to the start date. If you do not set an expected end date or if you enter 0, there is no expected duration for the action and no due date.

e. **Description** - Enter a description for the action.

7. In each **Reference URL** field, provide a link to an external website that contains supplementary reference information. Enter the hyperlink in this format: `https://www.example.com`.

The hyperlinks that you define to support an action are displayed in plain text and are not clickable. To the care team, the links display as clickable links.

8. Click **Save**.

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#### Related information

[Configuring external system references \(on page 241\)](#)

## Modifying actions

You can update client or care team actions in the actions library. For actions that are automatically added to the care plan from a goal, assessment, or questionnaire, you can delay the start date, or set how long you expect the action to take.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Actions**.  
The library of actions is displayed.
3. Click **Edit** in the **Actions** menu of an action.  
The **Edit Action** page opens.
4. Update the following information.
  - **Name** - Enter a name of 3 characters or more.
  - **External System Reference** - If applicable, associate an external system reference with the action that you are updating so that an integrated system can identify the action when it is sent from Watson™ Care Manager. Enter a unique reference number of up to 20 alphanumeric characters. When sending an action as an API attribute, the external system identifies the action by its external system reference.
  - **Responsibility** - You can change the responsibility for a care team action to either User Creating Action or Care Team Member. If you want to change the responsibility for an action from client to care team, or from care team to client, you must delete the action and create it again.
  - **Category** - Select a category for the action, for example, Appointment, Education, or Reunification.
  - Date settings, which are applied to an action only when you automatically add that action to a goal, assessment, or questionnaire.

- **Start date (Days)** - The date that an action must be started, based on a specific number of days after the action is added to a care plan. When a number of days is not defined, the start date becomes the day that the action is added to the care plan.
  - **Expected End Date (Days)** - The date that an action is expected to be completed, based on a specific number of days after the start date for the action. When you do not specify days in this field, the user sees a blank field for Expected End Date.
  - **Description** - Enter a description for the action.
5. In each **Reference URL** field, provide a link to an external website that contains supplementary reference information. Enter the hyperlink in this format: <https://www.example.com>.
- The hyperlinks that you define to support an action are displayed in plain text and are not clickable. To the care team, the links display as clickable links.
6. Click **Save**.

## Deleting actions

You can delete an action from the actions library. When you delete an action, you delete any association between the action and goals. Deleting an action does not affect any instances of the action on care plans.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Actions**.  
The library of actions is displayed.
3. Click the **Actions** menu of the action, and click **Delete**.
4. Click **Yes** to confirm.

## Configuring categories for actions

Use *categories* to group actions into categories, for example, Screening or Education. A library of categories come with the product by default and are displayed for care teams to select.

Access the categories for an action to update them, or to verify that they are correct. You can also reorder the sequence in which categories are displayed.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Select **Care Planning > Actions**, and select **Category**.  
The existing categories are displayed. The categories that come with the product are enabled by default and cannot be edited.

**Note:**

The list of categories applies to both client actions and family actions.

You cannot hide the Appointment category so all actions for the category are disabled.

3. Select **New** to add a category.

- a. Enter a name for the category in the **Name** field.
- b. Enter an optional alphanumeric external system reference in the **External System Reference** field

**External System Reference** is a value that is intended for external API users.

For example, if you configure an external system reference as **101** for category value **Reunification**. Then if an external system wants to send a completed action to Watson™ Care Manager through the API, it could specify an attribute of

```
Action Name = Reunification
Action Status = Completed
Action Outcome = 101
```

c. Select **Save**.

4. Manage the display of a category by completing the following steps in the **Actions** menu of the category:

- Select **Edit** to modify the name of a category.
- Select **Show** to make a category available for the care team to use.
- Select **Hide** to make a category unavailable in the actions library. Hiding the category does not affect any uses of this category in existing care plans.

5. Select **Reorder** to reorder the sequence of categories. Then, select the icon of the category that you want to reorder and drag it to a new location on the **Reorder Category** page.

## Configuring outcomes for actions

**Outcomes** are the expected results of an action, for example **Successful**, or **Abandoned**.

Access the outcomes for an action to update them, or to verify that they are correct. You can also reorder the sequence in which outcomes are displayed.

1. Sign in with your administrator credentials.

Your home page opens.

2. Select **Care Planning > Actions**, and select **Outcomes**.

The existing outcomes are displayed. The outcomes that come with the product are enabled by default and cannot be edited.



**Note:**

The list of outcome values applies to both client actions and family actions.

3. Select **New** to add an outcome.

- a. Enter a name for the outcome in the **Name** field.

- b. Enter an optional alphanumeric external system reference in the **External System Reference** field

**External System Reference** is a value that is intended for external API users.

For example, if you configure an external system reference as **101** for outcome value **Successful**. Then if an external system wants to send a completed action to Watson™ Care Manager through the API, it could specify an attribute of

```
Action Name = Completed
```

```
Action Status = Completed
```

```
Action Outcome = 101
```

- c. Select **Save**.

4. Manage the display of an outcome by completing the following steps in the **Actions**  menu of the outcome:

- Select **Edit** to modify the name of an outcome.
- Select **Show** to make an outcome available for the care team to use.
- Select **Hide** to make an outcome unavailable in the actions library. Hiding the outcome does not affect any uses of this outcome in existing care plans.

**Note:**

The **Pending** outcome value is disabled and cannot be used by the care team. If you were to configure the **Pending** action outcome with a display value of **Shown**, an action cannot be completed when care team members select **Pending** as the outcome.

5. Select **Reorder** to reorder the sequence of outcomes. Then, select the  icon of the outcome that you want to reorder and drag it to a new location on the **Reorder Outcomes** page.

## Configuring progress values

View and edit progress values so that they reflect your organization's requirements.

Access the progress values to verify that they are correct. The default progress list is as follows: **None**, **Unacceptable**, **Poor**, **Satisfactory**, **Good**, and **Excellent**.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Select **Care Planning > Progress**.  

3. Select the **Actions** icon  on the progress you want to edit and then select **Edit**.
4. Edit the progress and select **Save**.

## Configuring services

Services are the delivery of care or goods to an individual, typically delivered by a provider at a cost per unit. You can configure a library of services for your organization, configure unit types for the delivery of services, configure service categories to group related services, and configure the outcomes that care teams can select when they close a service. Services do not need to be manually registered in Watson™ Care Manager. Using the provider registry APIs (inbound API), you can automatically register providers and services in Watson™ Care Manager from an existing record in an external system and ensure that the data is accurately reflected in Watson Care Manager.

### Creating services

You can create a library of services for your organization, define the units in which each service is delivered, and categorize related services.

External System Reference is only displayed for providers that are registered in Watson Care Manager by external systems.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Services**.

The services list is displayed. **External System Reference** displays the reference that the external system uses to identify the provider. The **Added on** field displays the date/time the record was added.

3. Click **New**.

The **New Service** page opens.

4. **Optional:** Select one or more categories that best describe the nature of the service. The list of service categories is populated from the configured service categories.

5. **Optional:** Select the default unit in which the service is delivered.

For example, hour, meal, or session.

The unit can be changed by the care team later.



**Note:**

Services that are created by the tenant administration user cannot be associated with categories or units that were created by an external system (Provider APIs).

6. **Optional:** Select one or more categories that best describe the nature of the service. The list of service categories is populated from the configured service categories.



**Note:**

If your organization uses IBM Watson® Care Manager Connect Providers, it is important to select a category. When service providers are listing their service offerings in Connect, first they select the category that their service belongs to and then they choose a service from within that category. If a service is not categorized, Connect users cannot select it.

7. **Optional:** Select one or more resource categories that best describe the nature of resources for the service. The category values are populated from the resource categories library.

If a resource category is not associated with a service, providers cannot select it when they create a group of resources for the service.

8. **Optional:** Enter a description of up to 250 characters.

9. Click **Save**.

## Creating service categories

Service categories describe the nature of a service, for example, Independent Living or Health and Wellness. Use service categories to group related services. If your organization uses IBM Watson® Care Manager Connect Providers, it is important to create service categories. Providers using Connect can only list services that are categorized. Categories do not need to be manually registered in Watson Care Manager. Using the provider registry APIs (service API), you can automatically register service offerings for a provider and the services, categories, and units' information from the service offering are added to the services library in Watson™ Care Manager.

External System Reference is only displayed for providers that are registered in Watson Care Manager by external systems.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Services** and select the **Categories** tab.

The service categories are displayed. **External System Reference** displays the reference that the external system uses to identify the provider. The **Added on** field displays the date/time the record was added.

3. Click **New**.

The **New Service Category** page opens.

4. Enter a unique name that is at least 3 characters.

5. Click **Save**.

The new service category becomes available for you to associate with services.

## Creating service unit types

Services are delivered in units, such as hours or meals. The units in which a service is delivered, and the number of units of a service that a client needs, are recorded on their care plan by the care team. Units do not need to be manually registered in Watson™ Care Manager. Using the provider registry APIs (service API), you can automatically register service offerings for a provider and the services, categories, and units' information from the service offering are added to the services library in Watson™ Care Manager.

External System Reference is only displayed for providers that are registered in Watson™ Care Manager by external systems.

By default, the following unit types are available:

- Hour
- Meal
- Session

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Services** and select the **Unit Types** tab.

The unit types are displayed.

3. Click **New**.

The **New Unit Type** page opens.

4. Enter a unique name.

5. Click **Save**.

The unit becomes available to select when care teams or administrators create or edit services.

## Creating service outcomes

Service outcomes are the outcomes that the care team can choose when they are closing a client service.

You can create extra service outcomes for your organization.

The following service outcomes are available by default:

- Abandoned
- Not Successful
- Successful

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Services** and select the **Outcomes** tab.

The service outcomes are displayed.

3. Click **New**.

The **New Outcome** page opens.

4. Enter a unique name for the service outcome.

5. Click **Save**.

The outcome becomes available to select when care teams close services.

## Creating service resource categories

Service resource categories can be chosen by providers when they record resource information for their services. You can create extra service resource categories for your organization.

Resource categories help providers to categorize resources for their services. For example, beds for a homelessness service.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Services** and select the **Resources** tab.  
The service resources are displayed.
3. Click **New**.  
The **New Resource Category** page opens.
4. Enter a unique name for the service category.
5. Click **Save**.

## Creating client types

You can add client types to the services library so that providers can choose the types of individuals that are eligible for their resources.

Adding a client type makes it available to providers to select when creating resource groups and for care teams to filter by when they search for services with available resources.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Services**, then select the **Resources** tab.
3. From the **Actions** menu of a client type, select **New**.  
The **New Client Type** page opens.
4. Enter a unique name.
5. Click **Save**.

## Modifying services

You can edit services in the services library. Your changes are applied immediately to services in the services library, however, existing services on care plans are not affected. Services that are created by an external system using the provider registry APIs are read-only in the tenant admin application and cannot be modified.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Services**.  
The services library opens.
3. From the **Actions** menu of a service, select **Edit**.  
The **Edit Service** page opens.
4. You can edit the following service information.

- Name - You can update the service name. Use 3 characters or more.
- Category - You can update the service category.
- Unit Type - You can update the default units in which the service is delivered.
- Resource Category - You update the resource category.
- Description - You can update the service description.

5. Click **Save**.

## Modifying service categories

You can edit the name of a service category. Your changes are applied immediately throughout the application. Service categories that are created by an external system using the provider registry APIs are read-only in the tenant admin application and cannot be modified.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Services** and select the **Categories** tab.  
The service categories are displayed.
3. From the **Actions** menu of a service category, select **Edit**.  
The **Edit Service Category** page opens.
4. Enter a unique name of 3 characters or more.
5. Click **Save**.

## Modifying service unit types

You can edit the name of a service unit type and show or hide unit types. In the library of configured service unit types, you can reorder the sequence in which unit types are displayed. Your changes are applied immediately throughout the application. Units that are created by an external system using the provider registry APIs are read-only in the tenant admin application and cannot be modified.

You show a service unit type to make it available for use by care teams, or hide a unit type to make it unavailable. Unit types for existing services on care plans are not affected.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Services** and select the **Unit Types** tab.  
The unit types are displayed.
3. To rename a unit type, from the **Actions** menu of a unit type, select **Edit**.  
The **Edit Unit Type** page opens.
  - a. Enter a unique name.
  - b. Click **Save**.

4. To hide a unit type, from the **Actions** menu of a unit type, select **Hide**.
5. To show a unit type, from the **Actions** menu of a unit type, select **Show**.
6. To reorder the sequence of service unit types, click **Reorder**. Drag and drop the service unit types to position them in your preferred order.

## Modifying service outcomes

You can edit the name of a service outcome and show or hide outcomes. In the library of configured service outcomes, you can reorder the sequence in which outcomes are displayed. Your changes are applied immediately throughout the application.

You show a service outcome to make it available for use by care teams, or hide an outcome to make it unavailable. Outcomes for existing services on care plans are not affected.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Services** and select the **Outcomes** tab.  
The service outcomes are displayed.
3. To rename a service outcome, from the **Actions** menu of an outcome, select **Edit**.  
The **Edit Outcome** page opens.
  - a. Enter a unique name.
  - b. Click **Save**.
4. To hide a service outcome, from the **Actions** menu of a outcome, select **Hide**.
5. To show a service outcome, from the **Actions** menu of a outcome, select **Show**.
6. To reorder the sequence of service outcomes, click **Reorder**. Drag and drop the service outcomes to position them in your preferred order.

## Modifying service resource categories

You can edit the name of a resource category. Your changes are applied immediately throughout the application.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Services** and select the **Resources** tab.  
The service resources are displayed.
3. From the **Actions** menu of a resource category, select **Edit**.  
The **Edit Resource Category** page opens.
4. Enter a unique name.
5. Click **Save**.

6. To hide a resource category, from the **Actions** menu of a resource category, select **Hide**.
7. To show a resource category, from the **Actions** menu of a resource category, select **Show**.

## Deleting service categories

You can delete a service category that is no longer needed. Deleting a service category makes it unavailable for selection when creating or editing services. The service category is removed from services in the service library, however, existing services on care plans are not affected.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Services** and select the **Categories** tab.  
The service categories are displayed.
3. From the **Actions** menu of a service category, select **Delete**.

## Modifying client types

You can update the name of a client type. Providers use client types to choose which types of individuals are eligible for their resources.

Providers can select a client type when creating resource groups and care teams can filter by client type when they search for services with available resources.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Services**, then select the **Resources** tab.
3. From the **Actions** menu of a client type, select **Edit**.  
The **Edit Client Type** page opens.
4. Enter a unique name.
5. Click **Save**.
6. To hide a client type, from the **Actions** menu of a client type, select **Hide**.
7. To show a client type, from the **Actions** menu of a client type, select **Show**.
8. To reorder the sequence of client types, click **Reorder**. Drag and drop the client types to position them in your preferred order.

## Enabling the resource filters feature

You can show or hide all pages, actions, buttons, fields, and columns that relate to the resource filters feature in the care team Community Resources page.

To show resource filter options on the Community Resources page in the care team application, your organization must license the Connect Providers web application and you must show the Providers functionality.

You can show the resource filters feature whenever it is suitable for your organization. You might choose to only show the resource filter options when resource information is available in the Connect Providers application. Care team members can use the resource filter options to search for provider services with available resources for clients. When the resource filters feature is shown, care team members can access the resource availability, category, gender, and client type filter options. When the resource filters feature is hidden, care team members cannot access the resource availability, category, gender, and client type filter options.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Plan**.  
The **Plan** page opens.
3. From the **Actions** menu of the Resource Filters plan setting, select **Show**.
4. From the **Actions** menu of the Resource Filters plan setting, select **Hide**.

## Deleting services

You can delete a service from the services library. The deleted service is no longer available for care teams to add to care plans. Existing services on care plans are not affected. Services that are created by an external system using the provider registry APIs are read-only in the tenant admin application and cannot be deleted.

You cannot delete a service that is associated with a provider until the provider service is closed.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Services**.  
The services library is displayed.
3. From the **Actions** menu of a service, select **Delete**.

## Configuring barriers

A barrier is an issue that can prevent an individual from achieving their care plan goals, actions, or services. An individual who is without transportation, for example, has a barrier that the care team must consider when they are assessing and managing their care plan. You can configure a library of barriers for the care team to associate with clients, goals, actions, or services.

## Creating barriers

You can create barriers for the care team to associate with a client, or their goals and actions.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Barriers**.

Existing barriers are displayed.

3. Click **New**.

The **New Barrier** page opens.

4. Enter a name and description for the goal.



**Tip:**

Enter a name of 3 characters or more to enable searches for the name.

5. In each **Reference URL** field, provide a link to an external website that contains supplementary reference information. Enter the hyperlink in this format: `https://www.example.com`.

The hyperlinks that you define to support a barrier are displayed in plain text and are not clickable.

To the care team, the links display as clickable links.

6. Click **Save**.

The barrier status is set to Active in the application.

## Creating barrier categories

Barrier categories divide barriers into certain groups that the care team can assign when they are creating a barrier. Barrier categories give the team a way to filter barriers. If a suitable barrier category does not exist in the library of configured categories, you can create a new barrier category for the team to use.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Barriers** and select the **Categories** tab.

The barrier categories are displayed.

3. Click **New**.

The **New Barrier Category** page opens.

4. Enter a unique name that is at least 3 characters.

5. Click **Save**.

The new barrier category becomes available for the care team to associate with barrier.

## Modifying barriers

You can update a barrier in the library of configured barriers.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Barriers**.

Existing barriers are displayed.

3. Click the **Actions** menu of the barrier, and click **Edit**.

The **Edit Barrier** page opens.

4. Update the name or description of the barrier.



**Tip:**

Enter a name of 3 characters or more to enable searches for the name.

5. In each **Reference URL** field, provide a link to an external website that contains supplementary reference information. Enter the hyperlink in this format: `https://www.example.com`.

The hyperlinks that you define to support a barrier are displayed in plain text and are not clickable.

To the care team, the links display as clickable links.

6. Click **Save**.

## Modifying barrier categories

You can edit the name of a barrier category and show or hide categories. You can reorder the sequence in which barrier categories are displayed. Your changes are applied immediately throughout the application.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Barriers** and select the **Categories** tab.

The barrier categories are displayed.

3. To rename a barrier category, from the **Actions** menu of a category, select **Edit**.

The **Edit Barrier Category** page opens.

- a. Enter a unique name.

- b. Click **Save**.

4. To hide a barrier category, from the **Actions** menu of a category, select **Hide**.

5. To show a task category, from the **Actions** menu of a category, select **Show**.

6. To reorder the sequence of barriers, click **Reorder**. Drag and drop the barriers to position them in your preferred order.

## Deleting barriers

If a configured barrier is incorrect or obsolete, you can delete it. If you delete a barrier, however, the barrier is unavailable for selection when the care team create a new barrier. The care team can continue to work with existing instances of the barrier that are already associated with clients, goals, or actions.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Barriers**.

Existing barriers are displayed.

3. Click the **Actions** menu of the barrier, and click **Delete**.

4. Click **Yes** to confirm that you want to delete the barrier.

The barrier status is set to Canceled in the application, and cannot be reactivated.

## Configuring for Connect applications

If your organization uses IBM Watson® Care Manager Connect Individuals or IBM Watson® Care Manager Connect Providers, there are some mandatory configurations that you must make in Watson™ Care Manager before any clients or providers can be onboarded to the Connect Individuals or Connect Providers applications. Optionally, you can configure client messaging so that clients can send and receive messages from their care teams from the Connect Individuals application. If the provider was registered by an external system, the Send Onboarding Request function is disabled.

1. Sign in with your administrator credentials.

Your home page opens.

2. From the **Quick Links** page or the side navigation menu, click **Organization**.

3. [Configure your organization name \(on page 233\)](#).

4. If your organization uses the Connect Providers application, [configure the Connect Providers Support Contact \(on page 234\)](#).

5. If your organization uses the Connect Individuals application, [configure the Connect Individuals Support Contact \(on page 234\)](#).

6. If your organization uses the Connect Individuals application, optionally you can [configure client messaging \(on page 237\)](#).

## Registering providers and services

If you plan to manage your organization's providers in IBM Watson® Care Manager, use the Providers feature to create and maintain a provider registry for your organization. A provider is an organization

or individual who provides services, such as healthcare or community services, to clients under care management.

Configure a library of services for your organization. For each provider, select the services that they provide and add their provider-specific information. Activate the provider's services to make them available for care teams.

You can manually register providers and maintain a registry of providers for your organization. Alternatively, providers can be registered automatically in Watson™ Care Manager by external systems.

You cannot maintain providers that are registered by an external system, all actions for the provider record are read-only. You cannot delete providers who are registered from external systems, closed providers, or providers with associated services.

Only providers who are manually registered can access the Connect Providers application. If Connect Providers is used, you must delete the provider user account before you can close the provider.

You can search community services for providers with available resources, so that you know which providers have availability before you contact them to secure the service for your client. You can filter the search on resource category, availability, resource gender & client type. Information about resource availability for a service is added to the search results and to the Service page.

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#### Related information

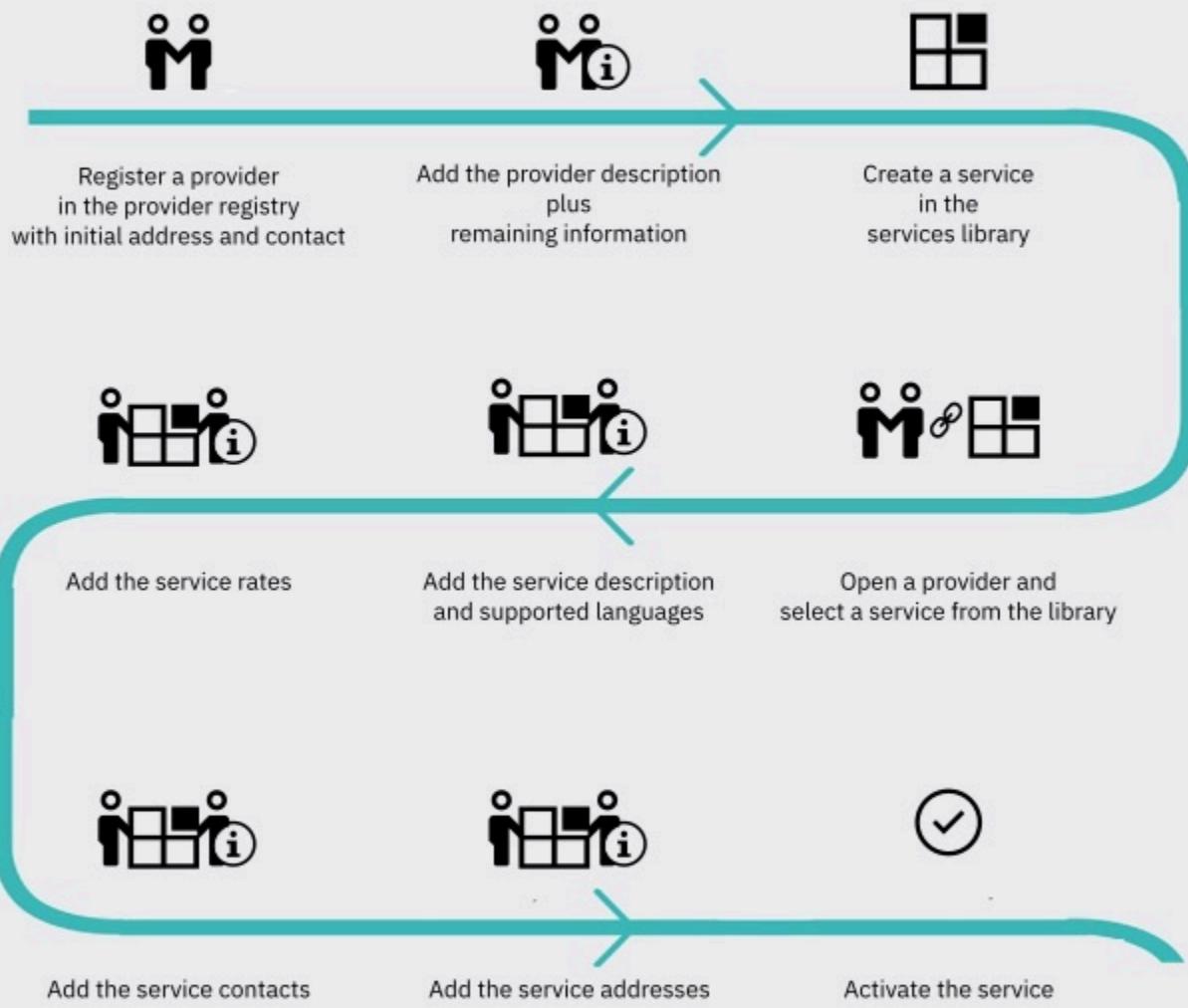
[Configuring languages for organizations \(on page 234\)](#)

## Getting started with registering providers and services

To make services available to care teams, you must register community service providers, configure a library of services, and for each provider, select services from the library and add their provider-specific information, such as their rates.

For example, you might want to configure a taxi service to provide transportation. Register *Example Taxi* as a service provider, and create a *Transportation* service. Open *Example Taxi*, select the *Transportation* service, and add Example Taxi's service information, such as their service description and rates. Then, activate Example Taxi's taxi service to make the transportation service available to care teams.

Click the interactive graphic for more information



1. [Registering providers \(on page 109\)](#)
2. [Adding provider information \(on page 110\)](#)
3. [Creating services \(on page 93\)](#)
4. [Creating provider services \(on page 117\)](#)
5. [Adding descriptions and languages for provider services \(on page 119\)](#)
6. [Adding rates for provider services \(on page 120\)](#)
7. [Adding contacts for provider services or service groups \(on page 121\)](#)
8. [Adding addresses for provider services or service groups \(on page 123\)](#)
9. [Activating provider services added by care teams \(on page 125\)](#)

## Enabling the Providers feature

The Providers feature enables you to add and manage service providers and their services in IBM Watson® Care Manager and is hidden by default in the care team application. Depending on your organization's requirements, you can show or hide the Providers feature for care teams. Provider settings for the administrator are always shown.

The Providers feature resides in IBM Watson® Care Manager and is not an add-on component. However, some IBM Watson® Care Manager add-on components, such as IBM Watson® Care Manager Community Service Payment, depend on Providers. If any of these add-on components are licensed, you cannot hide the Providers feature. If the provider was registered by an external system, you cannot maintain its details because it is maintained by an external provider registry. If the provider was manually registered, you can maintain its details.

Depending on your selection, all pages, actions, buttons, fields, and columns that relate to providers are shown or hidden in the care team application.

If your organization does not want to register and manage service providers in IBM Watson® Care Manager, then the Providers feature can remain hidden. Care teams can still manage services in the care team application.

If your organization wants to manage service providers in IBM Watson® Care Manager, you can show the Providers feature whenever it is suitable for your organization. You can show your configured providers and provider services to care teams from the start, or delay showing them until a more suitable time. For example, you might hide Providers while you migrate providers from another system.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Plan > Plan**.  
The **Plan** page opens.

3. Show Providers by selecting **Actions > Show**.
4. Hide Providers by selecting **Actions > Hide**.

## Configuring identification types for providers

Configure the different types of identification that you can capture for providers, for example, their Employee ID, Passport Number, or Insurance Number. Create a provider identification type to make it available for selection in a menu when you are adding providers. You can edit, show, or hide the identification types, and set their order in the menu.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Select **Providers > Provider Registry Settings** from the **Side Navigation Menu**.  
The existing identification types are displayed.
3. Click **New**.  
The **New Identification Type** page opens.
4. Enter an identification type name and click **Save**.  
By default, new identification types are shown in the menu.
5. Select **Show** or **Hide** from the **Actions** menu to make it available or unavailable in the menu.
6. Select **Reorder** to reorder the identification types in the menu, and click **Reorder**.
7. Select **Edit** from the **Actions** menu of an identification type, rename the identification type and click **Save**.

## Searching for providers

You can search for providers in the provider registry.

You can search by name and identification number. Partial matching is supported for names.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation Menu**, select **Providers > Search for a Provider**.  
The **Search Providers** page opens.
3. Enter your search criteria and click **Search**.  
The search results are displayed, including primary addresses. If a primary address is not set for a provider, no address is displayed in the search results.
4. Click the provider's name to open their details.  
The provider's record opens.

## Registering providers

You must register providers so that they can provide services for your organization. Registered providers are added to the provider registry as active providers. To avoid duplicate registrations, ensure that you search for existing providers before you register a provider.

A unique reference number is generated for each registered provider, which cannot be modified or deleted. The name **Reference Number** is reserved for the generated reference number.

The provider record is the complete set of information about a provider that is available in the administrator application. The provider profile is information about a provider that is relevant to care teams and available in the care team application.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Providers > Provider Registry**.  
The provider registry opens.
3. Click **Register**.  
The **Register Provider** wizard opens.
4. Search for the provider to ensure that they are not already registered. Partial matches are supported for names and full matches for identification numbers.
5. If the provider is not registered, click **Next**. If the provider is already registered, click **Cancel**.
6. Enter these details for the provider:
  - **Name** - You must enter a provider name of at least 3 characters. The provider's name is mandatory.
  - **Phone** - Enter the provider's phone number.
  - **Email Address** - Enter the provider's email address.
  - **Identification Type** - Select the identification number type.
  - **Identification Number** - Enter an identification number.
  - **Website** - Enter the full web address for the provider's website. For example, `http://www.example.com` or `https://www.example.com`.
7. Enter the provider's Care Quality Commission (CQC) Provider ID.
  - **Provider ID** - Enter a CQC provider identification number in the format `1-1XXXXXXXX`. If you enter a CQC provider ID, it must be verified with a CQC service before it is saved. If the CQC service is not available, the ID number cannot be saved. You can add the CQC provider ID later. The CQC Provider ID applies only in the UK and the option is available in the UK only.
8. Enter an address for the provider.

- **Confirm Location** - You can confirm the map location of the address before saving. When you enter an address, a default map location is automatically assigned to the address based on the address information. Ensure that the address information is as accurate as possible for a more precise location. The map opens at the default location of the address. Drag the map to change the location of the address. If needed, you can reset the map to the default location. If you do not change the location, the default location is saved.
- **Primary** - A provider can have a single primary address, which is displayed on the provider's profile. If you want this address to be the primary address, select the **Primary** check box.

9. Enter a contact for a provider.

- **Name** - Enter the contact's name.
- **Role** - Enter the contact's role.
- **Phone** - Enter the contact's phone number.
- **Mobile Phone** - Enter the contact's mobile phone number.
- **Email Address** - Enter the contact's email address.
- **Primary** - A provider can have multiple primary contacts that are displayed on the provider's profile. If you want this contact to be a primary contact, ensure that the check box is selected. If not, clear the check box.

10. Click **Save** to register the provider.

The provider is added to the provider registry. A unique reference number is generated for the provider and provider information is added to the provider record.

## Adding provider information

You can add and update the details, identification numbers, description, and CQC Provider ID for providers in the provider registry.

You cannot modify or delete the unique reference number that is generated for each registered provider, and the name **Reference Number** is reserved for the generated reference number.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Providers > Provider Registry**.
3. Click a provider name.  
The provider's record opens.
4. Edit a provider's details by clicking **Actions > Edit Details**, edit the details, and then click **Save**.
  - **Name** - Enter the provider's name.
  - **Phone** - Enter the provider's phone number.

- **Email Address** - Enter the provider's email address.
  - **Website** - Enter the full web address for the provider's website. For example, `http://www.example.com` or `https://www.example.com`.
5. Click **Actions > Add Identification** to add an identification number and then click **Save**.
- **Identification Type** - Select the type of identification number.
  - **Identification Number** - Enter an identification number.
- a. Click **Edit** from the **Actions** menu of an identification to edit the identification.
  - b. Click **Delete** from the **Actions** menu of an identification to delete the identification.
6. Click **Actions > Edit Description** to add or edit a provider's description of up to 2000 characters and click **Save**.
7. Click **Actions > Edit CQC Provider ID** to add or update the provider's Care Quality Commission identification number and then click **Save**.
- **Provider ID** - Enter a CQC provider identification number in the format `1-1xxxxxxxx`. If you enter a CQC provider ID, it must be verified with a CQC service before it is saved. If the CQC service is not available, the ID number cannot be saved. You can add the CQC provider ID later. The CQC Provider ID applies only in the UK and the option is available in the UK only.
8. Click **Actions > Delete CQC Provider ID** to delete the provider's Care Quality Commission identification number and then click **Delete**.

## Adding contacts for providers

You can add and update contacts and set one or more primary contacts for a provider.

The provider record is the complete set of information about a provider that is available in the administrator application. The provider profile is information about a provider that is relevant to care teams and available in the care team application.

You can have multiple contacts for a provider in the provider record. You can have multiple primary contacts, which are shown on the provider's profile.

In the provider record, you can see any provider services that are associated with contacts.

External System Reference is only displayed for providers that are registered in Watson Care Manager by external systems.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Providers > Provider Registry**.
3. Click a provider name.

The provider's record opens. **External System Reference** displays the reference that the external system uses to identify the provider. **Added on** and **Updated on** display the date/time the record was added. **Source** and **Original Source System** are conditionally displayed.

4. Select **Contacts** to open the contacts list, click **New**, enter the contact details, and click **Save**.
  - **Name** - Enter the contact's name.
  - **Role** - Enter the contact's role.
  - **Phone** - Enter the contact's phone number.
  - **Mobile Phone** - Enter the contact's mobile phone number.
  - **Email Address** - Enter the contact's email address.
  - **Primary** - A provider can have multiple primary contacts that are displayed on the provider's profile. If you want this contact to be a primary contact, ensure that the check box is selected. If not, clear the check box.
    - a. From the **Contacts** list, click **Edit** from the **Actions** menu of a contact to edit the contact.
    - b. From the **Contacts** list, click **Delete** from the **Actions** menu of a contact to delete the contact.

## Adding addresses for providers

You can add and update addresses, confirm the map location of addresses, and set a primary address for providers in the provider registry.

You can have multiple addresses for a provider in the provider record, but each provider can have only a single primary address, which is shown on the provider's profile.

In the provider record, you can see any provider services that are associated with addresses.

External System Reference is only displayed for providers that are registered in Watson Care Manager by external systems.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Select **Providers > Provider Registry** from the **Side Navigation menu**.
3. Click a provider name.  
The provider's record opens.
4. Select **Addresses**.  
The **Addresses** page opens. **External System Reference** displays the reference that the external system uses to identify the provider. **Added on** and **Updated on** display the date/time the record was added. **Source** and **Original Source System** are conditionally displayed.
5. Add a provider address:

a. Select **New**.

The **New Address** page opens.

b. Enter the address as accurately as possible for a more accurate location.

When you enter an address, a default map location is automatically assigned to the address based on the address information.

c. **Optional:** Confirm the map location of the address before saving. Select **Confirm Location**.

The map opens at the default location of the address. If needed, drag the map to the correct location of the address. If needed, you can reset the map to the default location. Click **Confirm**.

If you do not change the location, the default location is saved.

d. Select the **Primary** check box to set this address to be the primary address.

e. Click **Save**.

6. Edit a provider address:

a. Select **Edit** from the **Actions** menu of the address.

The **Edit Address** page opens.

b. Update the address. Ensure that the address information is as accurate as possible for a more precise location.

If a location for an address was previously confirmed, this location is retained for the updated address unless you manually change it. Otherwise, when you edit an address, a default location is automatically assigned to the address based on the new address information.

c. **Optional:** Confirm the map location of the address by selecting **Confirm Location**. The map opens at the previously confirmed or default location of the address. If needed, drag the map to the correct location of the address. If needed, you can reset the map to the previously opened location. Click **Confirm**.

If you do not change the location, the previously confirmed or default location is saved.

d. Select the **Primary** check box to set this address to be the primary address.

e. Click **Save**.

7. Click **Delete** from the **Actions** menu of an address to delete the address.

Deleting an address deletes it from the provider and any associated services.

## Managing provider users

IBM Watson® Care Manager Connect Providers is a separately licensed add-on component for IBM Watson® Care Manager. Users of IBM Watson® Care Manager Connect Providers are members of service provider organizations. You can add users for the service provider organizations that are registered in IBM Watson® Care Manager. Then, using the Connect application, users from the service provider organizations can manage their organizations' profile, list their organizations' service offerings, and receive and respond to service inquiries that are sent by care team members.

### Inviting providers to register

You can invite a member of a service provider organization to be the Connect user for that organization. Connect users can manage the organization's profile and list the organization's service offerings. They also receive and respond to service inquiries from care team members.

The provider organization the person belongs to must be registered in the IBM Watson® Care Manager provider registry.

You can send one person in the provider organization an invitation to register as a Connect Providers user. When you create the invitation, you enter a secret code that the invited user enters when they register in the Connect Providers.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Providers > Provider Registry**.  
The provider registry opens.
3. Click a provider name. The provider's record opens. Open the **user** tab and click **Send Onboarding Request**.  
If a user is already invited or registered for the organization, the **Send Onboarding Request** is disabled.
4. Enter these details for the user and send the invitation.
  - **Name** - You must enter the user's name of at least 3 characters. The user's name is mandatory.
  - **Phone** - Enter the user's phone number. The phone number is optional.
  - **Email Address** - Enter the user's email address. The user's email address is mandatory.
  - **Secret Code** - Enter a secret code to be shared with the user. The secret code must have 6 - 256 alphanumeric characters. It is a single use code.

The user receives an email invitation to register. When the invitation is sent, you can view the status of the user's account on the Connect Providers user tab. Until the user registers, the account is in a Pending status. When the user completes registration, the account is in an Active status.

## Resending invitations to providers

The email that invites users to register with IBM Watson® Care Manager Connect Providers contains URLs that expire after a certain amount of time. To resend an invitation to a user, you must first close the existing Pending account for that user and send a new invitation.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Providers > Provider Registry**.  
The provider registry opens.
3. Click a provider name. The provider's record opens. Open the **Connect Providers Users** tab. Click **Close** to close the Pending account for the user.
4. Click **Send Onboarding Request**.
5. Enter these details for the user and send the new invitation.
  - **Name** - You must enter the user's name of at least 3 characters. The user's name is mandatory.
  - **Phone** - Enter the user's phone number. The phone number is optional.
  - **Email Address** - Enter the user's email address. The user's email address is mandatory.
  - **Secret Code** - Enter a secret code to be shared with the user. The secret code must have 6 - 256 alphanumeric characters. It is a single use code.

The user receives a new email invitation.

## Suspending Connect Providers user accounts

You can suspend a provider user's account to prevent them from signing in to Connect Providers, for example, because the user is temporarily on extended leave.

You can suspend only active provider user accounts. When a provider user is suspended, their user account is otherwise unaffected. The status of the provider user's account changes to Suspended. You can reactivate the provider's user account at any time.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Providers > Provider Registry**.  
The provider registry opens.

3. Click a provider name. The provider's record opens. Open the **Connect Providers Users** tab.
4. Select **Suspend Account** from the **Actions** menu and confirm by clicking **Suspend Account** again.

## Reactivating Connect Providers user accounts

You can reactivate a suspended Connect Providers user account to enable the provider user to access Connect Providers again with their onboarding details.

You can reactivate only suspended provider user's accounts.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Providers > Provider Registry**.  
The provider registry opens.
3. Click a provider name. The provider's record opens. Open the **Connect Users** tab.
4. Select **Reactivate Account** from the **Actions** menu and confirm by clicking **Reactivate Account** again.

## Closing Connect Providers user accounts

If an account is no longer required, for example, if the user has left the provider organization, you can close the IBM Watson® Care Manager Connect Providers account for the user.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Providers > Provider Registry**.  
The provider registry opens.
3. Click a provider name. The provider's record opens. Open the **Connect Providers Users** tab. Use the **Close** row action to close the account for the user.

The account is closed and the user can no longer access their Connect account.

## Adding services for providers

Configure a library of the services that are needed for your organization. For each provider, select services from the services library and add the provider-specific information, including the provider service description, available languages, rates, and contacts. If providers are using the IBM Watson® Care Manager Connect Providers application, they can configure and submit their own services for you to review and approve in the provider registry. Activate services to make them available to care teams.

## Configuring your organization's service library

Services can be delivered by multiple providers. Before you can configure services for specific service providers, you must configure services for your organization. Then, for each provider, you can select services from the services library, and configure them with the specific provider details for their services.



### Note:

Services that are created by the tenant administration user cannot be associated with categories or units that were created by an external system (Provider APIs).

### Related information

[Configuring services \(on page 93\)](#)

[Creating provider services \(on page 117\)](#)

## Creating provider services

Services can be offered by multiple providers. For each provider, select services from the services library, and add them to the provider so you can configure the provider-specific information. Providers and services can be added by external systems. Service offerings created in external systems are active by default.

External System Reference is only displayed for providers that are registered in Watson Care Manager by external systems.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Select **Providers > Provider Registry** from the **Side Navigation menu**.
3. Click a provider name.  
The provider's record opens. **External System Reference** displays the reference that the external system uses to identify the provider. **Added on** displays the date/time the record was added.
4. Click the **Services** tab.  
The provider's services and groups are displayed.
5. If configured, add a service by clicking **Add Service**.  
The **Add Service** page opens.
6. If configured, add a service group by clicking **Add Service Group**.  
The **Add Service Group** page opens.
7. Search for services by name, category, or description, select one or more services and click **Add**.  
A draft provider service is added for the provider.

## Grouping provider services

You can group provider services that share common information, such as their description, languages, addresses, or contacts, to help you to maintain service information for multiple services. Create a service group and add and remove services as needed. You can rename a service group if needed.

You can define the following information for a service group. The service group information applies to all services in the group and the group information is retained for a service if you remove it from a group.

- Description
- Languages
- Addresses
- Contacts

You define rates for individual provider services, rather than for service groups.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Select **Providers > Provider Registry** from the **Side Navigation menu**.
3. Click a provider name.  
The provider's record opens.
4. Select **Services**.  
The provider's services and service groups are displayed.
5. Add a service group by clicking **Add Service Group**, entering the group name, and clicking **Save**.
6. Add services to a service group:
  - Add a draft or active provider service by selecting **Add to Group** from the **Actions** menu of the service. The service group description, languages, addresses, and contacts are applied to the service, but the service rates for the individual service are retained.
  - Search for and add services:
    - a. Select a service group. The service group page opens.
    - b. Click **Add Service**, search for services by name, category, or description, select one or more services and click **Add**. The services are added as draft provider services.
7. Remove provider services from a service group.  
Removing a service from a service group does not remove the service from the provider and retains its status and the group information for the service.
  - a. Select a service group.  
The service group page opens.
  - b. Select **Remove** from the **Actions** menu of the service.

The **Remove Service** page opens.

- c. Click **Remove**.
  - d. Review and update the details for the provider service.
8. Rename a service group by clicking **Edit** from the **Actions** menu of the service group, updating the name and clicking **Save**.

## Adding descriptions and languages for provider services

You can add a provider service description and select the available languages. Your changes are applied immediately throughout the application.

External System Reference is only displayed for providers that are registered in Watson Care Manager by external systems.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Providers > Provider Registry**.
3. Click a provider name.  
The provider's record opens.
4. Click the **Services** tab.  
The provider services list opens.
5. Click a provider service name.  
The provider service home page opens. **External System Reference** displays the reference for the service offering sent in by the external system. **Added on** and **Updated on** display the date/time the record was added. **Source**, **Original Source System** and **External System Status** are conditionally displayed.
6. Edit the provider service details by clicking **Edit Details** from the **Details** section.  
The **Edit Details** page opens.
  - Enter the provider service description.
  - Select a language.
7. Click **Save**.

---

### Related information

[Configuring languages for organizations \(on page 234\)](#)

## Adding rates for provider services

Add one or more rates for each provider service. Use start and end dates to specify the rates for current and future periods. You can edit or delete service rates. Rates are set individually for services in service groups.

Rates have a start date and an optional end date. Care teams are shown the current rates, that is, any rates that are started and are not yet ended.

Rates consist of a charge per unit. Rates with the same unit cannot overlap, but you can have overlapping rates with different units. Use start and end dates to ensure that rates with the same unit do not overlap.

External System Reference is only displayed for providers that are registered in Watson Care Manager by external systems.

1. Sign in with your administrator credentials.

Your home page opens.

2. Select **Providers > Provider Registry** from the **Side Navigation menu**.

3. Click a provider name.

The provider's record opens.

4. Click the **Services** tab.

The provider's services and service groups are displayed. **External System Reference** displays the external system reference for the externally entered service offering rate.

5. Select a service or service group and add a provider service rate by completing the following steps:

- a. Click **Add Rate** for the service.

The **Add Rate** page opens.

- b. Enter the rate to two decimal places, and select a unit, start date and end date.

- c. Add the rate by clicking **Add**.

- d. Add another rate or click **Save**.

6. Edit a rate by completing the following steps:

- a. Click **Edit** from the **Actions** menu of the rate.

The **Edit Rate** page opens.

- b. Update the rate, unit, start date, or end date.

- c. Click **Save**.

7. Delete a rate by completing the following steps:

- a. Click **Delete** from the **Actions** menu of the rate.

The **Delete Rate** page opens.

- b. Click **Delete**.

## Adding CQC location IDs for provider services

In the UK only, you can add or edit the Care Quality Commission (CQC) location ID for a service. You can delete an unwanted CQC location ID.

This action is available in the UK only.

The location ID you enter is validated with the CQC before it is saved. Also, if you entered a CQC provider ID for the provider, it is validated against the provider ID linked to that location ID. If the CQC server is unavailable, the location ID cannot be saved and you must try again later.

1. Sign in with your administrator credentials.

Your home page opens.

2. Select **Providers > Provider Registry** from the **Side Navigation menu**.

3. Click a provider name.

The provider's record opens.

4. Click the **Services** tab.

The provider's services and service groups are displayed.

5. Choose one of the following options:

- a. Select a service or service group and add or edit a CQC location ID by selecting **Edit CQC Location ID** from the **Actions** menu of the service, entering or updating the location ID, and clicking **Save**.

- b. Select a service or service group and delete a CQC ID by selecting **Delete CQC Location ID** from the **Actions** menu of the service and clicking **Delete**.

## Adding contacts for provider services or service groups

You can add one or more contacts for provider services or service groups. Add existing provider contacts, or create a provider contact that is associated with the provider service or service group. You can edit or delete service or service group contacts, or remove a contact from a service or service group.

When you edit or delete a service or service group contact, your changes apply immediately to the provider contact throughout the application. When you remove a contact from a service or service group, the provider contact itself is not affected.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Providers > Provider Registry**.
3. Click a provider name.  
The provider's record opens.
4. Click the **Services** tab.  
The provider's services and service groups are displayed.
5. Select a service or service group.
6. Add a contact by clicking **Add Contact** from the **Contacts** section, choosing one of the following options, and clicking **Save**.
  - Select one or more existing provider contacts.
  - Create a provider contact by expanding **New Contact** and entering the contact details. You must enter at least one of the following options:
    - Phone
    - Mobile phone
    - Email
7. Edit a contact by completing the following steps:
  - a. Click **Edit** from the **Actions** menu of the contact.  
The **Edit Contact** page opens.
  - b. Update the contact details.  
You must have at least one of the following options:
    - Phone
    - Mobile phone
    - Email
  - c. Click **Save**.  
Your changes apply to the provider contact throughout the application.
8. Remove a contact from the service or service group by completing the following steps:
  - a. Click **Remove** from the **Actions** menu of the contact.  
The **Remove Contact** page opens.
  - b. Click **Remove**.
9. Delete a contact that is associated with the service or service group by completing the following steps:

- a. Click **Delete** from the **Actions** menu of the contact.

The **Delete Contact** page opens.

- b. Click **Delete**.

The provider contact is deleted throughout the application.

## Adding addresses for provider services or service groups

Add one or more addresses for each provider service or service group. Service group addresses apply to all services in the group. You can add existing provider addresses, or create a provider address that is associated with the provider service or service group. You can edit or delete provider service addresses, or remove an address from the provider service or service group.

- When you create an address for a provider service or service group, you are creating a provider address.
- When you delete a provider service address, the provider address is deleted from services and from the provider.
- When you delete a service group address, the provider address is deleted from the service group, from services, and from the provider.
- When you remove a provider service address, the provider address itself is not affected.
- When you edit a provider service or service group address, the provider address is updated throughout the application.

1. Sign in with your administrator credentials.

Your home page opens.

2. Select **Providers > Provider Registry** from the **Side Navigation menu**.

3. Click a provider name.

The provider's record opens.

4. Click the **Services** tab.

The provider's services and service groups are displayed.

5. Select a service or service group.

6. Add a provider service address by clicking **Add Address** from the **Addresses** section, choosing one of the following options, and clicking **Save**.

- Select one or more existing provider addresses. You can select all the addresses by clicking the check box beside the **Addresses** column.
- Create and add a provider service address by expanding **New Address** and entering the address details.

**Confirm Location** - You can confirm the map location of the address before saving. When you enter an address, a default map location is automatically assigned to the address based on the address information. Ensure that the address information is as accurate as possible for a more precise location. The map opens at the default location of the address. Drag the map to change the location of the address. If needed, you can reset the map to the default location. If you do not change the location, the default location is saved.

**Primary** - A provider can have a single primary address, which is displayed on the provider's profile. If you want this address to be the primary address, select the **Primary** check box.

7. Edit an address by completing the following steps:

- a. Click **Edit** from the **Actions** menu of the address and update the address. Ensure that the address information is as accurate as possible for a more precise location.

**Confirm Location** - You can confirm the map location of the address before saving. When you enter an address, a default map location is automatically assigned to the address based on the address information. If a location for an address was previously set manually, this location is retained for the updated address unless you manually change it. The map opens at the previously set or default location of the address. Drag the map to change the location of the address. If needed, you can reset the map to the previously opened location. If you do not change the location, the default location is saved.

**Primary** - A provider can have a single primary address, which is displayed on the provider's profile. If you want this address to be the primary address, select the **Primary** check box.

- b. Click **Save**.

8. Remove an address from the provider service by completing the following steps:

- a. Click **Remove** from the **Actions** menu of the address.

The **Remove Address** page opens.

- b. Click **Remove**.

9. Delete a provider address that is associated with a provider service by completing the following steps:

- a. Click **Delete** from the **Actions** menu of the address.

The **Delete Address** page opens.

- b. Click **Delete**.

## Activating provider services added by care teams

You must activate draft provider services to make them available to care teams. You can activate draft services individually, or activate all draft services in a group.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Select **Providers > Provider Registry** from the **Side Navigation menu**.  
The provider registry is displayed.
3. Click a provider name.  
The provider's record opens.
4. Select **Services**.  
The provider's services and service groups are displayed.
5. Activate a draft service by selecting **Activate** from the **Actions** menu of the service, and clicking **Activate**.
6. Activate all draft services in a group by selecting **Activate All Services** from the **Actions** menu of the service group, and clicking **Activate**.
7. Activate a draft service in a service group by selecting the service group, selecting **Activate** from the **Actions** menu of the service, and clicking **Activate**.

## Approving provider services submitted by providers

If providers are using the IBM Watson® Care Manager Connect Providers application, they can submit their own services for you to review in the provider registry. If you approve of the service, activate the service. The provider can see in the provider application that the service is approved and the service becomes available to the care team members in your organization when they search for services.

If payments are used and the service has a cost, check the provider's home page to see if the provider has successfully signed up to PayPal and can receive payment for their services before you activate the services.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Providers > Provider Registry**.  
The provider registry opens.
3. Select **Services Pending Approval**.
4. Select **Activate** from the **Actions** menu of a service.

## Rejecting provider services

If providers are using the IBM Watson® Care Manager Connect Providers application, they can submit their own services for you to review in the provider registry. If the service is not appropriate or requires changes before it can be activated, reject the service. The service returns to draft status so the provider can make changes.

If you reject a service, the provider can see in the provider application that the service is rejected and the reason why it was rejected. The provider can update the service and resubmit it. Rejected services are not available to care team members when they search for services.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Providers > Provider Registry**.  
The provider registry opens.
3. Select **Services Pending Approval**.
4. Select **Reject** from the **Actions** menu of a service.
5. Enter the reason why you are rejecting the service. The reason is displayed in the Connect application so that the Provider can resolve the issue with the service.
6. Click **Reject**.

## Closing provider services

You can close active provider services that are no longer needed to make them unavailable to the care teams. You can close all active services in a group. If there are draft services in a group, you must activate or delete them before you can close all services in the group.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Select **Providers > Provider Registry** from the **Side Navigation Menu**.  
The provider registry is displayed.
3. Click a provider name.  
The provider's record opens.
4. Select **Services**.  
The provider's services and service groups are displayed.
5. Close an active service by selecting **Close** from the **Actions** menu of the service, entering an end date and reason, and clicking **Save**.  
The provider service is closed and the service status history is updated.
6. Close all active services in a group by selecting **Close All Services** from the **Actions** menu of the service group, entering an end date and reason, and clicking **Save**.

All active provider services in the group are closed and their service status history is updated.

7. Close an active service in a service group by selecting the service group, selecting **Close** from the **Actions** menu of the service, entering an end date and reason, and clicking **Save**.

The provider service is closed and the service status history is updated.

## Reopening provider services

You can reopen a closed provider service if the provider of the closed service is active. The service is reopened as an active service.

1. Sign in with your administrator credentials.

Your home page opens.

2. Select **Providers > Provider Registry** from the **Side Navigation Menu**.

The provider registry is displayed.

3. Click a provider name.

The provider's record opens.

4. Select **Services**.

The provider's services and service groups are displayed.

5. Reopen a closed service by selecting **Reopen** from the **Actions** menu of the service, entering a reason as needed, and clicking **Reopen**.

The provider service is reopened as an active service.

6. Reopen a closed service in a service group by expanding the service group, selecting **Reopen** from the **Actions** menu of the service, entering a reason as needed, and clicking **Reopen**.

The service is reopened and the service status history is updated.

## Amending the provider service status history

You can edit the service status history for a service to correct errors or omissions in the end date or reason. Where a service was reopened and closed again, you can update the end date for the most recently closed status only.

1. Sign in with your administrator credentials.

Your home page opens.

2. Select **Providers > Provider Registry** from the **Side Navigation Menu**.

The provider registry is displayed.

3. Click a provider name.

The provider's record opens.

4. Select **Services**.

The provider's services and service groups are displayed.

5. Amend the status history for a service by selecting the service, and selecting **Edit** from the **Actions** of the service status. Update the end date or reason, and clicking **Save**.  
The service status history is updated.
6. Amend the status history for a service in a service group by selecting the service group, expanding the service, and selecting **Edit** from the **Actions** of the service status. Update the end date or reason, and click **Save**.  
The service status history is updated.

## Deleting provider services and service groups

You can delete service groups and draft provider services. After services are activated, you must close them instead. Deleting a service group deletes all draft services in the group. If a service group contains any active or closed services, you must remove them from the group before you can delete it.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Select **Providers > Provider Registry** from the **Side Navigation menu**.  
The provider registry is displayed.
3. Click a provider name.  
The provider's record opens.
4. Select **Services**.  
The provider's services and service groups are displayed.
5. Delete a service by selecting **Delete** from the **Actions** menu of the service, and clicking **Delete**.
6. Delete a service group by selecting **Delete** from the **Actions** menu of the service group, and clicking **Delete**.  
The service is deleted and the service status history is updated.
7. Delete a service in a service group by selecting the service group, selecting **Delete** from the **Actions** menu of the service, and clicking **Delete**.  
The service is deleted and the service status history is updated.

## Closing providers

You can close providers who no longer provide services for your organization. Closing a provider closes any active services that are associated with the provider. A closed provider is no longer available to the care teams for selection. You can amend the closure details for a closed provider.

Closing a provider or active provider services does not affect existing service deliveries.

1. Sign in with your administrator credentials.  
Your home page opens.

2. Select **Providers > Provider Registry** from the **Side Navigation Menu**.

The provider registry is displayed.

3. Click a provider name.

The provider's record opens.

4. Click **Actions > Close** to close the provider. Enter the mandatory end date and an optional reason and click **Save**.

The provider and any associated services are closed.

5. Click **Actions > Update Closure Details** to amend the closure details for a closed provider. Edit the end date or reason and click **Save**.

## Deleting providers

You can delete active providers from the provider registry. The provider is removed from the provider registry, and is no longer available to the care teams for selection. You cannot delete closed providers, or providers with associated provider services.

Deleting providers deletes their identification records, addresses, contacts, and service groups.

1. Sign in with your administrator credentials.

Your home page opens.

2. Select **Providers > Provider Registry** from the **Side Navigation menu**.

The provider registry is displayed.

3. Select **Delete** from the **Actions** menu of a provider.

## Configuring external inquiry statuses

If external inquiries are enabled for your organization, use the Inquiries API to manage a library of inquiry statuses that can be received from an external system.

You can add inquiry statuses to the library to suit the needs of your organization. You can edit an inquiry status, and associate an external system reference.

When sending an inquiry status as an API attribute, the external system identifies the inquiry status by its external system reference.



**Note:**

Your organization must request to have either the internal inquiries/Connect P feature enabled, or the External Inquiries/External Registry feature enabled. You cannot use both internal and external inquiries together.

## Creating inquiry statuses

Create inquiry statuses so that the inquiry status list is updated with the latest details.

When receiving an inquiry status as an API attribute, the external system identifies the inquiry status by its external system reference.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Inquiries**.

Existing inquiry statuses are displayed.

3. Click **New**.

The **New Inquiry Status** page opens.

4. Enter a name for the inquiry status.



**Tip:**

Enter 3 characters or more to enable searches for the name.

5. Optionally, enter an external system reference up to a maximum of 20 characters.

6. Click **Save**.

## Modifying inquiry statuses

Update the details of a configured inquiry status. When you edit an inquiry status, the inquiry status list is updated with the latest details.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Inquiries**.

Existing inquiry statuses are displayed.

3. To rename an inquiry status, click the **Actions** menu of the inquiry statuses.

The **Edit Inquiry Status** page opens.

- a. Enter a unique name.

- b. Click **Save**.

4. To hide an inquiry status category, from the **Actions** menu of an inquiry status, click **Hide**.

5. To show an inquiry status, from the **Actions** menu of an inquiry status, click **Show**.

## Configuring budgets

IBM Watson® Care Manager Community Service Payment is a separately licensed add-on component that enables care teams to manage services for clients within a weekly personal budget. If your organization has licensed Watson™ Care Manager Community Service Payment, you can configure the weekly budget settings for your organization.

### Configuring budget contributors

Budget contributions for a client's personal budget can come from a number of sources, such as client, the organization, or other funding sources. You can configure up to 10 budget contributors for your organization. Care teams can select the appropriate contributors when they create a client's weekly budget.

The current list of contributors is available for selection when care teams create a budget. However, new or removed contributors are not applied to existing budgets. To ensure that they choose from the current list of contributors, care teams are prompted to create a new budget if they edit an existing budget after you change the budget contributors.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Budgets**.  
The **Budgets** page opens.
3. Click **New Contributor**, enter a contributor name, and click **Save**.  
The contributor(s) that you configure are displayed when care teams create and view a budget.
4. If one of the contributors is a client budget contributor, click **Update** in the **Client Contributions** box and select the client budget contributor from the drop down list.



#### Note:

When you select a client contributions budget contributor, you enable the client contributions feature in the Connect Individuals and Care Team applications. Watson™ Care Manager uses the client contributions budget contributor that you specify when it processes client contributions. You can change an existing client contributor by selecting a new contributor from the list. If you no longer have a business need to process client contributions, disable the client contribution feature by selecting a blank value from the list. Selecting a blank value disables the client contributions feature in the Connect Individuals and Care Team applications and means that Watson™ Care Manager will no longer process contributions from clients. The Client Contributions section updates with the selected contributor or blank value.

5. Click **Edit** from the **Actions** menu of a contributor to edit the contributor's name and click **Save**.
6. Click **Delete** from the **Actions** menu of a contributor and click **Delete** to delete the contributor.  
The contributor is no longer available to care teams when they create a budget. Existing contributors on budgets are not removed.

If you are processing payments using Watson™ Care Manager, you can now grant permissions to receive payments from the client contributor into your organization's PayPal account.

## Configuring budget approvals

Configure whether budgets are approved automatically or manually. For manual budget approvals, you must select a care team role as a budget approval role. Care team members with that role can then approve or reject budget submissions in the care team application. For automatic approvals, budgets are approved on submission.



### Note:

If you switch from manual to automatic approvals, you must leave the approval role selected until all pending budgets are approved in the care team application.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Budgets**.  
The **Budgets** page opens.
3. Click **Edit Approval**.
4. Select whether budgets are approved automatically or manually.
5. For manual budget approvals, you must select a care team role to be the budget approval role.

## Configuring payments

IBM Watson® Care Manager Community Service Payment is a separately licensed add-on component. With IBM Watson® Care Manager Community Service Payment, care teams can make payments to service providers with PayPal. You must configure the billing agreement for payments to service providers for your organization. To use payments, your instance of Watson™ Care Manager must have the Providers feature enabled and have licensed IBM Watson® Care Manager Connect Providers.

## Configuring a PayPal billing agreement

For Watson™ Care Manager to process payments to providers on your organization's behalf, an active billing agreement must exist between IBM Watson™ Care Manager and your organization's PayPal

account. You must create a PayPal billing agreement to process payments. You are redirected to the PayPal website to create the agreement.

You must have the login credentials for the PayPal account that your organization will use to make payments to providers. If your organization does not have a business account, you can create a business account with a linked bank card as part of the billing agreement creation work flow in PayPal.

If there has never been a billing agreement created, the billing agreement details are blank, and the **PayPal** button is shown.

When an active billing agreement is in place, the billing agreement details are shown, including the billing agreement ID. The **PayPal** button is hidden.

If an existing billing agreement was canceled, the billing agreement details are shown with a canceled status, and the **PayPal** button is shown.

1. Sign in with your administrator credentials.

Your home page opens.

2. From the **Side Navigation menu**, select **Payments**.

The **Payments** page opens. A **PayPal** button is available only if there is no active billing agreement.

3. Click the **PayPal** button.

The PayPal merchant store log-in page opens.

4. Log in with the appropriate PayPal governing authority funding account credentials.

5. Review the information and click **Agree and Continue** on the PayPal billing agreement.

The PayPal billing agreement is created. The **Payment** page is updated with the agreement details and the agreement status is set to active.

6. If you want to cancel a billing agreement, click **Cancel**.



**Important:**

If you cancel a billing agreement, you must create a new agreement before the next payment due date or all payments to providers will fail. An active billing agreement must be in place to so that payments can be made successfully.

When there is an active billing agreement in place, care team members can authorize payments to providers who have on boarded their PayPal accounts to receive payments.

---

**Related information**

Setting up payments (on page )

## Granting permissions to receive client contributions

Your organization might require clients to contribute financially towards the cost of their care. You can configure your organization's PayPal account so that client contributions can be received.



### Note:

Signing up for contributions using Internet Explorer 11 is not supported, use one of the [other supported browsers](#).

You must have the login credentials for the PayPal account that your organization will use to receive contributions. If your organization does not have a PayPal business account, when you click PayPal, you will be prompted to create a business account with a linked bank card and guided through the process.

If permissions are already granted, the **Permissions To Receive Contributions** section displays but **PayPal** button is hidden. To revoke permission, you must log in to PayPal.

If permissions have been revoked in PayPal, *No* displays in the **PayPal Permissions Granted** field and the PayPal button displays so that you can grant permissions again.



### Important:

If you revoke the permissions to receive contributions, you must grant permissions again before the next contribution due date or no contributions will be processed.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Payments** and open the **Contributions** tab.  
A **PayPal** button is available in the **Permissions to Receive Contributions** tab.
3. Click the **PayPal** button.  
The PayPal merchant store log-in page opens.
4. Log in with the appropriate PayPal governing authority funding account credentials.
5. Review the information and click **Agree and Continue** on the PayPal billing agreement.  
Permissions are granted to receive contributions into the organization's PayPal account. The **Permissions to Receive Contributions** section refreshes to show that permissions are granted.

The organization can now receive contributions from clients into the PayPal account. The organization will receive contributions from individual clients when the client has signed up in Connect to make contributions towards their services and when the client's budgets and services have been approved and authorized by the care team.

---

**Related information**

Setting up payments (*on page* )

## Configuring a failed client contribution task

So that the appropriate care team members can take action if a client's contribution is not processed successfully, you can configure a task to be generated when the contribution fails. You can configure the user or role that the task is assigned to. So that action to resolve the issue with the contribution is taken in a timely fashion, you can select if the task should fall due on the day that the contribution fails.

You must configure the client contribution task in the Task library. For more information, see [Creating tasks \(on page 136\)](#).

Only one task can be configured for failed client contributions at a time.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Payments**, and open the **Tasks** tab.
3. Click **Add Task**.
4.
  - a. Click **Add**.
  - b. Search for and select the client contribution task that you configured in the Task library.
  - c. Optionally, check **Assign to Primary Care Team Member** if the task should be assigned to a primary care team member on the client's care team.
  - d. From the list of available care team roles, select a role to assign the task to. If you assign a task to a role that is not assigned to a user, an informational displays. Tasks are added to the unassigned list for users with that care team role who can accept and complete the task.
  - e. Optionally, check **Due on Creation Date**, if the task is to be due on the day that the task is generated, that is the day that the client's contribution failed. This setting overrides any due date set when you configured the task in the Task library.
  - f. Click **Add**.

The task is added and is generated for the specified users or roles when a client's contribution fails. After you add the task, you can update the configured task if required. You can remove the configured task if it is no longer required.

## Configuring tasks

A task is an item of work that care team members and supervisors must complete. You can create a library of tasks for your organization and make them available for use by care teams. You can create, modify, and delete tasks. You can configure tasks that you add to the library to be automatically generated for care team members to action when they complete program enrollments, questionnaires, or assessments.

Automatically generated tasks are displayed in a care team member's My Tasks list for completion. First, add the tasks to the library. Then, associate the tasks with the appropriate programs, assessments, and questionnaires.

---

### Related information

[Generating tasks from questionnaire results \(on page 70\)](#)

[Generating tasks based on measure classifications \(on page 44\)](#)

## Creating tasks

You can create tasks for a supervisor or a care team member to complete that relate to a client or a general item of work.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Tasks**.

Existing tasks are displayed.

3. Click **New**.

The **New Task** page opens.

4. Enter a name and description for the task.



**Tip:**

Enter 3 characters or more to enable searches for the name.

5. Select a category that best describes the nature of the task.

6. Select a priority that ranks the importance of the task in the client's care.

7. Enter a **Due Date (Days)** value to configure the due date for the task. This value sets the due date for the task to be a specific number of days after the task is added.

8. Click **Save**.

## Creating task categories

Task categories divide tasks into certain groups that the care team can assign when they are creating a task. Task categories give the team a way to filter tasks. If a suitable task category does not exist in the library of configured categories, you can create a new task category for the team to use.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Tasks** and select the **Categories** tab.

The tasks categories are displayed.

3. Click **New**.

The **New Task Category** page opens.

4. Enter a unique name that is at least 3 characters.

5. Click **Save**.

The new task category becomes available for the care team to associate with tasks.

## Modifying tasks

You can update a task in the library of configured tasks.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Tasks**.

Existing tasks are displayed.

3. Click the **Actions** menu of the task, and click **Edit**.

The **Edit Task** page opens.

4. Update the name or description of the task.



### Tip:

Enter 3 characters or more to enable searches for the name.

5. Select a category that best describes the nature of the task.



### Restriction:

If a previously configured category is set to be hidden from view, you cannot select the option in the Category list.

6. Select a priority that ranks the importance of the task in the client's care.

7. Update the **Due Date (Days)** value to set the due date for the task to be a specific number of days after the task is added.
8. Click **Save**.

## Modifying task categories

You can edit the name of a task category and show or hide categories. In the library of configured service task categories, you can reorder the sequence in which categories are displayed. Your changes are applied immediately throughout the application.

You show a task category to make it available for use by care teams, or hide a category to make it unavailable. Categories for existing tasks on care plans are not affected.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Tasks** and select the **Categories** tab.  
The task categories are displayed.
3. To rename a task category, from the **Actions** menu of a category, select **Edit**.  
The **Edit Task Category** page opens.
  - a. Enter a unique name.
  - b. Click **Save**.
4. To hide a task category, from the **Actions** menu of a category, select **Hide**.
5. To show a task category, from the **Actions** menu of a category, select **Show**.
6. To reorder the sequence of task categories, click **Reorder**. Drag and drop the task categories to position them in your preferred order.

## Deleting tasks

If a configured task is incorrect or obsolete, you can delete it. Note, however, that if you delete a task, you also delete any associations between the task and programs, questionnaires, and assessments.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Tasks**.  
Existing tasks are displayed.
3. Click the **Actions** menu of the task, and click **Delete**.  
The **Delete Task** page opens.
4. Click **Yes** to confirm that you want to delete the task.

## Configuring task closure reasons

When a care team member or supervisor closes a task that is related to their work or clients from Watson™ Care Manager, a reason must be recorded. You can configure and manage a library of reasons for why a task was closed.

### Adding task closure reasons

If a suitable task closure reason does not exist in the library of configured reasons, you can add a new reason. The reasons that you configure become available to the care team to select when they attempt to close a task.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Tasks > Closure Reasons**.  
The tabs in the Closure Reasons library contain a list of reasons for closing a task.
3. To add a new task closure reason, from the **Closure Reasons** tab, click **New**. The **New Closure Reason** page opens.

### Modifying task closure reasons

You can update a task closure reason. When you change a task closure reason in the library of configured reasons, all existing instances in client records are updated.

The default task closure reasons that come with the product cannot be edited: Successful, Unsuccessful, Disenrolled from program, Completed program, Did not enroll in program.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Tasks > Closure Reasons**.  
The tabs in the Closure Reasons library contain a list of reasons for closing a task.
3. To update a task closure reason, from the **Actions** menu, click **Edit**.  
The **Edit Closure Reason** page opens
4. Update the closure reason. Ensure the updated reason is a unique reason that does not duplicate any existing task closure reason in the library. Click **Save** to add the closure reason to the library.  
The Task Closure Reasons list opens.
5. Use the **Show** and **Hide** actions to display the reason to the care team or hide it from view.
  - To hide the reason, from the Actions menu, select **Hide**.
  - To show the reason, from the Actions menu, select **Show**.

For users who configured to show the program closure options that allow a user to remove care team members, tasks, referrals, alerts and care team actions when completing, disenrolling or updating a program status to Not enrolled, please note the following:

- The task closure reasons Disenrolled from program, Completed program and Did not enroll in program will continue to be set on any tasks that are closed when the program status is updated, even if you set the task closure values to Hidden.
  - The task closure reasons Disenrolled from program, Completed program and Did not enroll in program will not be available to users who are manually closing tasks using the Close Task action, if you set them to Hidden.
6. To reorder the sequence of task closure reasons, click **Reorder**. Drag and drop the reasons to position them in your preferred order.

## Configuring alerts

You can configure a library of alerts that highlight different aspects of a client's care that needs action or attention from the care team, for example, a Blood Pressure alert. An alert indicates that a client needs immediate attention from the care team. You can create and modify alerts for the care team to associate with clients.

### Creating alerts

You can create alerts for the care team to highlight some aspect of a client's care that needs their action or attention, for example, a Blood Pressure alert.

You can associate an external system reference with the alert record that you are creating. When sending an alert as an API attribute, the external system identifies the alert name by its external system reference.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Alerts**.  
Existing alerts are displayed.
3. Click **New**.  
The **New Alert** page opens.
4. Name the alert.



#### Tip:

Enter a name of 3 characters or more to enable searches for the name.

5. In the External System Reference field, enter a unique reference number of up to 20 alphanumeric characters.
6. Click **Save**.

---

#### Related information

[Configuring external system references \(on page 241\)](#)

## Modifying alerts

You can update an alert in the library of configured alerts. An alert highlights some aspect of a client's care that needs action or attention from the care team, for example, a Blood Pressure alert.

You can update the alert name and if not previously configured, you can associate a new external system reference with the alert record. When sending an alert as an API attribute, the external system identifies the alert name by its external system reference. If you update an existing external system reference that was previously configured and is already in use in existing integrations, you might cause existing integrations to fail.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Alerts**.  
Existing alerts are displayed.
3. From the **Actions** menu of an alert, modify the alert by choosing from the following options:
  - Select **Edit**.
    - In the **Name** field, rename the alert. Enter a name of 3 characters or more to enable searches for the name.
    - In the **External System Reference** field, enter a unique reference number of up to 20 alphanumeric characters.
    - Click **Save**.
  - Select **Show** or **Hide** to show or hide the alert to the care team.
4. To reorder the sequence of consent types, click **Reorder**. Drag and drop the alerts to position them in your preferred order.

## Configuring care teams

You can configure care teams for effective work assignment.

## Configuring care team skills

You can configure a library of care team skills and assign the skills to members of the care team who have those skills. For example, you can create the Spanish skill and apply it to care team members who speak Spanish. You can remove a care team skill from a care team member as needed.

When they create care teams, care managers can check the skills that are assigned to potential care team members to work on a client's care plan.

## Creating care team skills

You must create care team skills before you can add the skills to members of the care team.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Team > Care Team Skills**.  
The **Care Team Skills** library opens.
3. Click **New**.  
The **New Care Team Skill** page opens.
4. Enter the skill, to a maximum of 64 characters.
5. Click **Save**.

---

### Related information

Searching for users (*on page* )

## Modifying care team skills

You can update a care team skill in the library of configured skills.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Team > Care Team Skills**.  
The **Care Team Skills** library opens.
3. Click the **Actions** menu of the skill, and click **Edit**.  
The **Edit Care Team Skill** page opens.
4. Update the name of the skill, to a maximum of 64 characters.
5. Click **Save**.

## Deleting care team skills

If a configured care team skills is incorrect or obsolete, you can delete it. Note, however, that you cannot delete a skill that is already assigned to a care team member.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Team > Care Team Skills**.  
The **Care Team Skills** library opens.
3. Click the **Actions** menu of the skill, and click **Delete**.  
The **Delete Care Team Skill** page opens.
4. Click **Yes** to confirm that you want to delete the skill.

## Assigning skills to care team members

You can assign care team skills to care team members from the library of configured skills.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Team > Search Users**.  
The **Search Users** page opens.
3. Search for target care team member and go to their **Home** page.
4. Click the **Care Team Skills** tab.  
Existing skills that the care team member has are displayed.
5. Click **Add**.  
The **Add Care Team Skill** window opens.
6. Enter the partial or complete name of a skill and click **Search**.  
A list of skills that match your search string is displayed.
7. Select skill that you want to add, and click **Add**.  
The skill is assigned to the care team member.

---

### Related information

Searching for users (*on page* )

## Removing skills from care team members

If a skill no longer applies to a member of the care team, you can remove the skill.

1. Sign in with your administrator credentials.  
Your home page opens.

2. Click **Care Team > Search Users**.

The **Search Users** page opens.

3. Search for target care team member and go to their **Home** page.

4. Click the **Care Team Skills** tab.

Existing skills that the care team member has are displayed.

5. Click the **Actions** menu of the skill, and click **Delete**.

6. Click **Yes** to confirm that you want to remove the skill from the care team member.

## Configuring care team roles

You can configure a library of care team roles and assign the roles to members of the care team who can fulfill those roles. You can remove a care team role from a care team member as needed.

When they create care teams, care managers can check the roles that are assigned to potential care team members to work on a client's care plan.

## Creating care team roles

You must create care team roles before you can add the roles to members of the care team.

You can associate an external system reference with the care team role that you are creating. When sending a care team role as an API attribute, the external system identifies the care team role by its external system reference.

You can view and configure the capacity for new care team roles. Capacity is a non-mandatory attribute for care team roles. The default capacity for all care team roles is 150. The total capacity of a user is 300 clients with two assigned roles. However, your supervisor will be able to update the capacity of the care team user. You can only insert numerals in the capacity field. The capacity column is sorted in ascending and descending order. If no capacity is configured for the care team role, Not Set is displayed.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Team > Care Team Roles**.

The **Care Team Roles** library opens.

3. Click **New**.

The **New Care Team Role** page opens.

4. Enter the role, to a maximum of 64 characters.

5. In the External System Reference field, enter a unique reference number of up to 20 alphanumeric characters.

6. In the Capacity field, enter a capacity for the care team role. You can enter numerals up to a maximum of four digits.
7. Click **Save**.

---

#### Related information

[Searching for users \(on page 240\)](#)

[Configuring external system references \(on page 241\)](#)

## Modifying care team roles

You can update a care team role in the library of configured roles.

You can rename the care team role and if not previously configured, you can associate a new external system reference with the care team role record. When sending a care team role as an API attribute, the external system identifies the care team role by its external system reference. If you update an existing external system reference that was previously configured and is already in use in existing integrations, you might cause existing integrations to fail.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Team > Care Team Roles**.  
The **Care Team Roles** library opens.
3. Click the **Actions** menu of the role, and click **Edit**.  
The **Edit Care Team Role** page opens.
4. Update the name of the role, to a maximum of 64 characters.
5. Update the capacity of the role, to a maximum of four digits. If you do not enter any value, **Not Set** is displayed.
6. In the External System Reference field, enter a unique reference number of up to 20 alphanumeric characters.
7. Click **Save**.

## Deleting care team roles

If a configured care team role is incorrect or obsolete, you can delete it. However, you cannot delete a care team role if a task is configured to be automatically added to the care team role while running an assessment, questionnaire, or program with a client. In addition, you cannot delete a care team role that is assigned to a care team member.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Team > Care Team Roles**.  
The **Care Team Roles** library opens.
3. Click the **Actions** menu of the role, and click **Delete**.
4. Click **Yes** to confirm that you want to delete the role.

## Assigning roles to care team members

You can assign care team roles to care team members from the library of configured skills.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Team > Search Users**.  
The **Search Users** page opens.
3. Search for target care team member and go to their **Home** page.
4. Click the **Care Team Roles** tab.  
Existing roles that the care team member has are displayed.
5. Click **Add**.  
The **Add Care Team Role** window opens.
6. Select the role that you want to add, and click **Save**. The role is assigned to the user.

---

### Related information

Searching for users (*on page* )

## Removing roles from care team members

If a role no longer applies to a member of the care team, you can remove the role.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Team > Search Users**.  
The **Search Users** page opens.
3. Search for target care team member and go to their **Home** page.
4. Click the **Care Team Roles** tab.  
Existing roles that the care team member has are displayed.
5. Click the **Actions** menu of the role, and click **Delete**.
6. Click **Yes** to confirm that you want to remove the role from the care team member.

## Configuring care team groups

Configure a library of care team groups for use by care managers and supervisors so that they do not need to add multiple members to a client's care team individually. When a care manager or supervisor selects a care team group, all members of the group are added to the client's care team.

You can add, modify, and delete care team groups. In addition, you can manage specific members of a group.

**Note:**

If your organization uses organizations units, do not configure care team groups. The care team groups feature is not currently supported for use with organization units.

## Creating care team groups

You must create a care team group before you can add members to the group.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Team > Care Team Groups**.  
The Care Team Groups library opens.
3. Click **New**.  
The **New Care Team Group** page opens.
4. Name the care team group, to a maximum of 100 characters. Each care team group must have a unique name.
5. Optional: Enter a care team group description, to a maximum of 5000 characters.
6. Click **Save**.

## Adding members to care team groups

Add members to a care team group so that they are automatically added to care teams when the group is used by care managers and supervisors.

Search for a member to add to the care team group by entering some search criteria. Full and partial matches are returned and special characters are supported, for example, you can add a member with a last name of O'Neill. However, note that searching for O'Neill will not return O Neill or O'Neill in the search results and vice versa. You can search for members by name, care team role, or skill. For example, you might want to add only users with a specific care team role to the group.

Only active users with a care team role(s) are returned in your search results.

You can add up to 30 members to a group.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Team > Care Team Groups**. The Care Team Groups library opens.
3. Click the **Actions** menu of a care team group, and click **Add Care Team Members**. The Add Care Team Members page opens.
4. Specify a name, role, or skill and click **Search** to search.
5. Select one or more users.
6. Click **Add** to add the users as members of the group.

## Removing members from care team groups

You can remove a member from a care team group, for example, if their care team role is no longer required in the group.

If a member has multiple roles in the group, you must select each role to fully remove the member. Existing groups that are associated with clients and include that member are unaffected.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Team > Care Team Groups**. The Care Team Groups library opens.
3. Expand a care team group to see its members.
4. Click the row **Actions** menu for a member, and click **Remove**. The Remove Care Team Member page opens.
5. If the member has multiple care team roles, select each role that is no longer required in the group.
6. Click **Remove**.

## Modifying care team groups

You can update the name and description of a care team group.

1. Sign in with your security administrator credentials.  
Your home page opens.
2. Click **Care Teams > Care Team Groups**.  
The Care Team Groups library opens.
3. Click the **Actions** menu of a care team group, and click **Edit**.  
The **Edit Care Team Group** page opens.
4. Modify the name, to a maximum of 100 characters.

5. Modify the description, to a maximum of 5000 characters.
6. Click **Save**.

## Deleting care team groups

If a configured care team group is incorrect or obsolete, you can delete it. Deleted care team groups are no longer available for use by care managers and supervisors.

Deleting a care team group has no impact on existing care teams that are assigned the care team group. Members of the care team group remain members of the client's care team unless a care manager removes them manually.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Team > Care Team Groups**.  
The care team groups library opens.
3. Click the **Actions** menu of a care team group, and click **Delete**.
4. Click **Yes** to confirm that you want to delete the care team group.

## Configuring client consent to share information

An individual must consent to share their personal health information with a member of the care team, for example, their lab results or mental health history. If a suitable consent does not exist in the library of configured consent records, you can create a new consent record for the team to use.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Team > Consent Records Covered**.  
The **Consent Records Covered** page opens.
3. Click **New**.  
The **New Consent Record Covered** page opens.
4. Enter a consent record that does not duplicate any existing record in the library.
5. Click **Save**.

## Modifying client consent to share information

You can update consent records to capture the personal health information that an individual is willing to share with a care team member.

If you update a consent record that is used in existing relationships between care team members and clients, the existing instances of the consent record are affected.

In the library of configured consent records, you can reorder the sequence in which consents are displayed. You can edit the name of the consent and show or hide consents. Your changes are applied immediately throughout the application.

When consents records are shown, they are available for care teams to select when they register an individual in the application. You can hide a consent record that is not needed and it becomes unavailable for selection.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Team > Consent Records Covered**.  
The **Consent Records Covered** page opens.
3. Except for the **All** records option, you can edit existing consent records. Click the **Actions** menu of a consent, and click **Edit**.  
The **Edit Consent Record Covered** page opens.
4. Update the consent name.
5. Click **Save**.
6. To hide a consent record, from the **Actions** menu of a record, select **Hide**.
7. To show a consent record, from the **Actions** menu of a record, select **Show**.
8. To reorder the sequence of consent records, click **Reorder**. Drag and drop the consent records to position them in your preferred order.

## Configuring care team visit frequency

You can set the frequency of visits or meetings that the care team can have with individuals. You can add new frequency values to the library of configured frequencies to suit the needs of your organization. For example, a care team member might only need to visit a client once every quarter.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Team > Frequency**.  
The **Frequency** library opens.
3. Click **New**.  
The **New Frequency** page opens.
4. Enter a frequency value that does not duplicate any existing frequency in the library.
5. Click **Save**.

## Modifying care team visit frequency

In the library of configured frequencies, you can update any frequency that captures how often the care team visit or meet with individuals.

If you update a frequency that is used in existing relationships between care team members and clients, the existing instances of the frequency are affected.

You can reorder the sequence in which frequencies are displayed. You can edit the name of the frequency and show or hide frequencies. Your changes are applied immediately throughout the application.

When frequencies are shown, they are available for care teams and administrators to select when they register an individual in the application and build their team. You can hide a frequency that is not needed and it becomes unavailable for selection.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Team > Frequency**.  
The **Frequency** library opens.
3. Click the **Actions** menu of the frequency, and click **Edit**.  
The **Edit Frequency** page opens.
4. Update the frequency value.
5. Click **Save**.
6. To hide a frequency, from the **Actions** menu of a frequency, select **Hide**.
7. To show a frequency, from the **Actions** menu of a frequency, select **Show**.
8. To reorder the sequence of frequencies, click **Reorder**. Drag and drop the frequencies to position them in your preferred order.

## Configuring client data

In IBM Watson® Care Manager, *client data* is the information that an organization wants to record and maintain about clients, for example, address or contact information.

Before a care team can record and maintain client data, a *client data type* must be configured to define the exact information that can be captured and stored. A client data type represents the logical grouping of related attributes about which the organization wants to record information in respect of a client.

A library of non-configurable client data types is included in Watson™ Care Manager. As an administrator, you can also define and configure other client data types that your organization requires.

Client data types are versioned so that you can work on a data type without affecting the current active version. A *client data type version* is essentially a version of the client data type at a particular point in time. When you create a client data type, a draft version of the data type is automatically created. After you finish configuring a client data type, you must activate the version to make the client data type available for use. You can configure only a version of a client data type that is in the In Edit, or draft, state. Only one In Edit version can exist.

**Note:**

Depending on your organization's required level of security, your security administrator can specify configurable and non-configurable client data as data access group criteria. When your security administrator enters a value for the attribute in the security administration application, only free form values are supported. For more information, see [Automatically adding clients to data access groups \(on page \)](#).

**Note:**

When you add a record for a data type that contains the condition '**a Date Time attribute that must be on or after the current date time**', the care manager can enter any time entry between 12:00am and 11:59:59pm when the date is the current date to meet the date time condition.

You can allow or prevent client data type version sharing with external systems. You can download an API definition document for an active and shared client data type and make it available to the systems integrator for your organization who is responsible for syncing external systems with Watson™ Care Manager.

## Default non-configurable client data types in Watson™ Care Manager

By default, a library of client data types is included in the application so that a care team can quickly capture and maintain client data across several common areas. If a suitable client data type does not exist in the library of configured data types, you can create a new client data type for the team to use.

A list follows of the default client data types and the preconfigured categories that they are grouped into. You cannot modify or delete these data types or categories. These client data types are non-configurable.

### Contact data type category

#### Address

Records address information for the client such as their home and mailing address.

#### Contact Preferences

Records the preferred contact type and language to use when you are communicating with the client.

#### **Email Address**

Records email addresses to use when you are communicating with the client.

#### **Phone Number**

Records phone numbers such as home and mobile numbers.

#### **Social Network Contact**

Records details about a client's social network of friends, family, neighbors, and carers.

### **Demographic data type category**

#### **Birth and Death**

Records the client's birth and death details.

#### **Gender**

Records the gender of the client.

#### **Identification**

Records different types of identification for the client.

#### **Marital Status**

Records the marital status of the client.

#### **Name**

Records any names that the client uses such as their registered name or alternative names.

### **Background data type category**

#### **Health background**

Records background information about a client's health.

#### **Personal background**

Records background information about a client.

#### **Social background**

Records background information about a client's social environment.

### **Clinical data type category**

#### **Allergy**

Records allergy information for the client.

#### **Condition**

Records condition information for the client.

#### **Coverage**

Records medical insurance or insurance plan information for the client that is received from an external system. This data type is visible by the care team only if your instance of Watson™ Care Manager is integrated with an external system.

#### **Laboratory Test**

Records laboratory test information for the client.

#### **Medication**

Records medication information for the client.

#### **Observation**

Records observation information for the client that is received from an external system. This data type is visible by the care team only if your instance of Watson™ Care Manager is integrated with an external system.

#### **Risk**

Records risk information for the client.

### **Vitals data type category**

#### **Blood Pressure**

Records blood pressure information for the client.

#### **Body Mass Index**

Records body mass index information for the client.

#### **Body Temperature**

Records body temperature information for the client.

#### **Heart Rate**

Records heart rate information for the client.

#### **Height**

Records height information for the client.

#### **Oxygen Saturation**

Records blood oxygen level information for the client.

### Respiratory Rate

Records the respiratory rate information for the client.

### Waist Circumference

Records waist circumference information for the client.

### Waist-to-Height Ratio

Records the waist-to-height ratio information for the client.

### Weight

Records weight information for the client.

You can configure more client data types to suit your requirements. Examples of other client data types that you can configure are a client's addiction counseling visits or family history information.

---

### Related information

Getting started with configuring client data (*on page* )

## Showing and hiding non-configurable client data types

Show or hide non-configurable client data types so that you can allow the care teams to include only the relevant client data type data for a client.



#### Note:

If you choose to hide non-configurable client data types, you must hide the client data type in the share care plan template to ensure the data is not printed in the Share Care Plan PDF document.

You cannot hide the following data types because they are required on registration or in another part of the application:

- Name
- Address
- Gender
- Birth and Death
- Identification
- Phone
- Marital Status
- Email Address
- Tag

1. Sign in with your administrator credentials.  
Your home page opens.
  2. Select **Client Data**.
  3. In the **Client Data** pane, select **Client Data**.
  4. In the **Client Data** page, select the **Non-Configurable** tab.
5. Manage the display of data types by completing the following steps in the **Actions**  menu of the data type:
- To make a hidden data type available for the care team, select **Show**, then select **Show** in the **Show Client Data** page.
  - To make a shown data type unavailable for the care team, select **Hide**, then select **Hide** in the **Hide Client Data** page.

## Creating client data types

A client data type defines the exact information that can be recorded and stored in the application and must be defined before the care team can capture client data.

If the non-configurable client data types that come with the product are not suitable, you can create more client data types for your organization. A client data type is required for each type of information that you want to capture about clients. You can associate an external system reference with the client data type that you are configuring so that incoming data from an external API can be mapped to the configured client data type in Watson™ Care Manager.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data**.  
The tabs in the **Client Data** library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.



### Restriction:

You cannot modify the client data types that are provided by default with the application.

3. Click **New**.
4. Enter a name, and a logical name for the client data type.



### Tip:

A logical name is a unique name that other configuration components use to identify and reference the client data type. Logical names must start with a lowercase or uppercase



English alphabetic character, and can contain only alphabetic characters, numerals, and underscores. No spaces are allowed.

5. From the category list, select the information category in which the client data type belongs: Contact, Demographics, Background, Clinical, or Vitals. The Category field governs the category that the data type belongs to and where the data type is displayed to the user.
6. Optionally, in the **External System Reference** field, enter a unique reference number of up to 20 alphanumeric characters to associate with the client data type that you are creating. When sending a client data type as an API attribute, the external system identifies the client data type by its external system reference.
7. Optionally, select the **Include in Share Care Plan** check box to include the client data type in the Share Care Plan PDF. The check box is unselected by default.
8. Optionally, enter a description of the client data type.
9. Click **Save**. The first version of the client data type is automatically created in an `In Edit` state.

Configuring metadata for client data types (*on page* [\)](#)

#### Related information

[Default non-configurable client data types in Watson Care Manager \(on page 152\)](#)

## Defining attributes for a client data type

An *attribute* is a single piece of information that you want to record for a client data type version. You can define Data Attributes, Address Attributes, and Comment Attributes.

*Metadata* is the attributes and properties of the client data type that you must configure to define how the data type looks, behaves, and stores data in the application. Attribute types can include String, Integer, Date, DateTime, Money, Boolean, Float, Value Set.

## Adding data attributes

You can configure different types of data attributes in the Metadata tab on the Client Data page. Data attributes can be of type String, Integer, Date, DateTime, Money, Boolean, Float, Value Set.

You must configure at least one data attribute or a comments attribute for a client data type version. Otherwise, care teams cannot create records in respect of the client data type.

Depending on your organization's required level of security, your security administrator can specify configurable and non-configurable client data as data access group criteria. When your security

administrator enters a value for the attribute in the security administration application, only free form values are supported. For example, if you configure a data attribute of type `valueSet` that contains a list of selectable values, and later your security administrator specifies one of the values as criteria in a data access group, your security administrator must enter the value as free form text. For more information, see [Automatically adding clients to data access groups \(on page 158\)](#).

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data**

The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.

Open a draft version.

- If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
- If no **In Edit** version exists, select **New Version** from the client data type row level **Actions**menu to create an in-edit version.

3. Click **Metadata > Actions > New Data Attribute**

The **New Data Attribute** page opens.

4. Set the data attribute options in the following table.

**Table 3. Data Attribute options**

Options name	Action
Attribute Name	<p>Specify a unique name for the data attribute, and comply with the following naming conventions:</p> <ul style="list-style-type: none"> <li>◦ Be equal to or fewer than 40 characters in length for all types except value set which is 14</li> <li>◦ Start with a lowercase English alphabetical character</li> <li>◦ Contain only lowercase or uppercase English alphabetical characters and numerical characters</li> <li>◦ Exclude any reserved words such as <code>comments</code> because this keyword is a reserved identifier in the client data page</li> </ul>

Options name	Action
	 <b>Note:</b> Attribute names do not display on the generated client data page. In addition, data attribute names cannot contain underscores.
Attribute Type	<p>From the list of attribute types, select the type that applies to the data attribute from the following list.</p> <ul style="list-style-type: none"> <li>◦ String (default) - any character value</li> <li>◦ Integer - whole numbers</li> <li>◦ Date - a calendar date</li> <li>◦ DateTime - a calendar date and time</li> <li>◦ Money - a currency value</li> <li>◦ Boolean - true or false</li> <li>◦ Float - a floating-point number</li> <li>◦ ValueSet - a set of values from which users can select at runtime</li> </ul>
Default Value	<p>Optional: Enter a default value to display for the data attribute on the generated client data page.</p> <p>In most cases, the Default Value is a free form field, except for the following attributes.</p> <ul style="list-style-type: none"> <li>◦ Boolean lists that contain <code>true</code> and <code>false</code> values</li> <li>◦ <code>ValueSet</code> lists that contain selectable values for a data attribute</li> <li>◦ For <code>String</code> data types, a default value must be equal to or less than the maximum length value for the string.</li> </ul>
Mandatory	<p>Select the check box to indicate that the attribute is a mandatory field to be completed on the generated client data page. An asterisk will confirm to the care team member that field value input is required.</p>
<<Data Type>> Options	<p>To control attribute behavior, apply data attribute options by attribute type. See the options for each data type -</p>

Options name	Action
	String, Integer, Float, Money, Date, Date Time, and Value Set - in the topics that follow.
Attribute Note	Only for annotative purposes, enter an attribute note. The note is not globalized and care team members do not see it at run time. The maximum number of characters for all attribute notes is 2000.

5. Click **Save** to save your configuration in the client data type.

## String data type

For Data Attributes with a data type of `String`, you can set a range of string options such as the minimum and maximum number of characters in the attribute string. At run time, care managers cannot enter more characters in a field than you specify in the string option value.

The following table identifies the string options that you can set for Data Attributes with a data type of

`String`

**Table 4. String Type Options**

String option name	Description
<b>Minimum Length</b>	<p>Sets the minimum number of characters that the care manager can enter for the string value. Locale-specific format can be specified.</p> <p>If the care manager enters a value that is less than the value that you set for this property, a validation error occurs when the client data record is saved.</p>
<b>Maximum Length</b>	<p>Sets the maximum number of characters that the care manager can enter for the string value. Locale-specific format can be specified.</p> <div style="border: 2px solid red; padding: 5px; margin-top: 10px;">  <b>Restriction:</b>            Specify to a maximum value of 20.         </div>

**Table 4. String Type Options (continued)**

String option name	Description
	If the care manager enters a numerical value that exceeds the value that you set for this property or 20, a validation error occurs when the client data record is saved.
<b>Remove Leading Spaces</b>	If the check box is selected, specifies to remove leading white space from the attribute string value that the care manager enters before they save the client data record.
<b>Remove Trailing Spaces</b>	If the check box is selected, specifies to remove trailing white space from the attribute string value that the care manager enters before they save the client data record.
<b>Convert to Uppercase</b>	If the check box is selected, specifies to convert the attribute string value that the care manager enters to uppercase before they save the client data record.

## Integer, Float, or Money data types

For Data Attributes with a number data type of `Integer`, `Float`, or `Money`, you can set a range of numeric options such as the minimum and maximum values in the attribute value. At run time, care team managers cannot enter numerical values in the field that are not in the range that you specify in the numeric option value.

The following table identifies the numeric options that you can set for Data Attributes with a data type of `Integer`, `Float`, or `Money`:

**Table 5. Numeric Type Options**

Numeric option name	Description
Minimum Value	<p>Sets the minimum value that the care team manager can enter for the attribute value.</p> <p>If the care team manager enters a numerical value that is less than the value that you set for this numeric option, a validation error occurs when the client data record is saved.</p>
Maximum Value	Sets the maximum value that the care team manager can enter for the attribute value.

**Table 5. Numeric Type Options (continued)**

Numeric option name	Description
	If the care team manager enters a numerical value that is higher than the value that you set for this property, a validation error occurs when the client data record is saved.

## Date data type

For Data Attributes with a number data type of `Date`, you can set date options, for example, to compare the current date with the attribute date value.

The following table identifies the options that you can set for Data Attributes with a data type of `Date`:

**Table 6. Date Type Options**

Date options	Description
None	If selected, validates that no date comparison is required.
Current® Date Comparison	If selected, compares the date attribute value that the care team member enters with the current date.
Must be	Validates that the value that the care team member enters for the attribute date is before, after, equal to, not equal to, on or before, on or after, the current date. You can select the comparison operators from the list.
Custom Message	Only if <b>Current Date Comparison</b> is selected, you can add a custom validation message.

## DateTime data type

For Data Attributes with a number data type of `DateTime`, you can set date options, for example, to compare the current date and time with the attribute date and time value.

The following table identifies the date options that you can set for Data Attributes with a data type of `DateTime`:

**Table 7. DateTime Type options**

Date options	Description
None	If selected, validates that no date and time comparison is required.
Current® Date Comparison	If selected, compares the attribute value that the care team member enters with the current date and time.
Must be	Validates that the value that the care team member enters for the attribute date and time is before, after, on or before, on or after, the current date. You can select the comparison operators from the list.
Custom Message	Only if <b>Current Date Comparison</b> is selected, you can add a custom validation message.

## ValueSet data type

For data attributes with a data type of `ValueSet`, you can specify the values that an attribute can have from a minimum of 1 value to a maximum of 200 values. By defining the value set for an attribute, you enable care team members who are processing client data to select from these values at run time.

You must add at least one value if adding a value set.

The following table identifies the Value Set options that you can set for data attributes with a data type of `ValueSet`:

**Table 8. ValueSet Type Options**

Options name	Description
Value	Specifies the name of the value to a maximum of 40 characters.
Default Value	Sets a selected value as the default value in the ValueSet.
Add	Select Add to add the value to the ValueSet.
Attribute Note	Only for annotative purposes, enter an attribute description. The description is not globalized and care team members do not see it at run time. The maximum number of characters for all attribute notes is 2000.

## Adding address attributes

You can configure an address attribute so that care teams can record the relevant address information for their client in the care team workspace.

If you add an address attribute, ensure that you define at least one data attribute or a comments attribute so that care teams can create records in respect of the client data type.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data**

The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.

Open a draft version.

- If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
- If no **In Edit** version exists, select **New Version** from the client data type row level **Actionsmenu** to create an in-edit version.

3. Click **Metadata > Actions > New Address Attribute**

The **New Address Attribute** page opens.

4. Enter a unique name up to a maximum of 40 characters.

5. Optionally, select the check box to indicate that the attribute is a mandatory field to be completed on the generated client data page.

6. In the **Attribute Note** field, optionally enter an attribute note. Attribute notes do not display on the generated client data page. The maximum number of characters for all attribute notes is 2000.

7. Click **Save** to save your configuration in the client data type.

## Adding comments attributes

You can configure comments attributes so that at run time, the care team member can enter a comment in a multi-line free form text **Comments** field on the generated client data pages.

Define only one comments attribute for a client data type version.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data**

The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.

Open a draft version.

- If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
  - If no **In Edit** version exists, select **New Version** from the client data type row level **Actions** menu to create an in-edit version.
3. Click **Metadata > Actions > New Comments Attribute**
- The **New Comments Attribute** page opens.
4. In the **Attribute Note** field, optionally enter an attribute note. Attribute notes do not display on the generated client data page. The maximum number of characters for all attribute notes is 2000.
5. Click **Save** to save your configuration in the client data type.

## Adding related person attributes

You can configure a related person attribute so that care team members can associate a registered person with the client. For example, you can configure a related person attribute for care team members to link registered family members, or to associate a client's registered friend with the client.

Define only one related person attribute for a client data type version. In addition, ensure that you define at least one data attribute or a comments attribute so that care teams can create records in respect of the client data type.



### Note:

The related person attribute can be used to link registered clients only.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data**  
The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.  
Open a draft version.
  - If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
  - If no **In Edit** version exists, select **New Version** from the client data type row level **Actions** menu to create an in-edit version.
3. Click **Metadata > Actions > New Related Person Attribute**  
The **New Related Person Attribute** page opens.
4. Enter a unique name up to a maximum of 40 characters.
5. Optionally, select the check box to indicate that the attribute is a mandatory field to be completed on the generated client data page.
6. In the **Attribute Note** field, optionally enter an attribute note. Attribute notes do not display on the generated client data page. The maximum number of characters for all attribute notes is 2000.

7. Click **Save** to save your configuration in the client data type.



**Important:**

After you configure a related person attribute, ensure that you create the required client relationship types that care team members can use to link registered clients. For more information, see [Creating relationships \(on page 214\)](#).

## Configuring clusters for a client data type

You can configure data, address and comments clusters in your client data type. A cluster is a container for attribute fields that display on create, modify and view pages at run time.

### Creating data clusters

Configure a data cluster to group the data attributes in your client data type.

If you don't enter a title, no cluster title will display in the generated client data page. Specify a label for each attribute selected and specify if it should be modifiable on the second page of the New Data Cluster wizard.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data**

The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.

Open a draft version.

- If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
- If no **In Edit** version exists, select **New Version** from the client data type row level **Actions** menu to create an in-edit version.

3. Click **Metadata tab > New Data Cluster**.

The **New Data Cluster** page opens.

4. Enter the title of the cluster.

5. Select **On Create** checkbox to display data cluster on the create page of your client data type. By default, the checkbox is selected.

6. Select the **On View** checkbox to display data cluster on the view page of your client data type. By default, the checkbox is selected.

7. Select the **On Modify** checkbox to display data cluster on the modify page of your client data type. By default, the checkbox is selected.

8. Optionally, enter a description.
9. Select the data attributes to associate with the data cluster.
10. Click **Next** to move to the next page.
11. In the **Label** fields, enter the names for each attribute to be displayed on the generated client data page.
12. Select one or more **Modifiable** checkboxes to permit attribute modification on the generated client data page. By default, the checkbox is selected.
13. Select the **Use Default** check box to use the default value that is specified for the Default Value property for the related Source Attribute. If you select the Use Default check box and no default value is provided in the Data Attribute properties, the field is populated with the appropriate default values for the data type. For example, the current date is the default value for Data Attributes of type Date and Date Time, and 0 is the default value for Data Attributes of type Integer, Float and Money. By default, the check box is selected.
14. Select the **Use Blank** check box to display a blank value in the value set list on the generated client data page. Only shown for Value Set attributes.
15. Click **Back** to return to the previous page.
16. Click **Save** to add the data cluster to the client data type page.

## Creating address clusters

Configure an address cluster for each address attribute in your client data type.

If you don't enter an address cluster title, no cluster title will display on the generated client data page.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data**  
The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.  
Open a draft version.
  - If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
  - If no **In Edit** version exists, select **New Version** from the client data type row level **Actions** menu to create an in-edit version.
3. Click **Metadata tab > New Address Cluster**.  
The **New Address Cluster** page opens.
4. In the **Title** field, enter the name of the cluster.
5. Select the **On Create** check box to display the address cluster on the create page of your client data type. By default, the check box is selected.

6. Select the **On View** check box to display the address cluster on the view page of your client data type. By default, the check box is selected.
7. Select the **On Modify** check box to display the address cluster on the modify page of your client data type. By default, the check box is selected.
8. Optionally, enter a description of the address cluster.
9. Select an address attribute to associate with the address cluster. Only one address attribute can be selected for each address cluster.
10. Click **Save** to add the address cluster to the client data type.

## Creating comments clusters

Configure a comment cluster for a comments attribute in your client data type.

You can only have one comments attribute and one comments cluster per data type.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data**  
The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.  
Open a draft version.
  - If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
  - If no **In Edit** version exists, select **New Version** from the client data type row level **Actions** menu to create an in-edit version.
3. Click **Metadata tab > New Comments Cluster**.  
The **New Comments Cluster** page opens.
4. In the **Label** field, enter the label of the cluster. By default, **Comments** is displayed. This label will display on the generated client data page.
5. Select **On Create** check box to the display the comments cluster on the create page of your client data type. By default, the check box is selected.
6. Select the **On View** check box to display the comments cluster on the view page of your client data type. By default, the check box is selected.
7. Select the **On Modify** check box to display the comments cluster on the modify page of your client data type. By default, the check box is selected.
8. Optionally, enter a description.
9. Click **Save** to add the comments cluster to the client data type page.

## Creating related person clusters

Configure a related person cluster for a related person attribute in your client data type.

You can only have one related person attribute and one related person cluster per data type.

1. Sign in with your administrator credentials. Your home page opens.

2. Click **Client Data**

The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.

Open a draft version.

- If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
- If no **In Edit** version exists, select **New Version** from the client data type row level **Actions** menu to create an in-edit version.

3. Click **Metadata tab > New Related Person Cluster**.

The **New Related Person Cluster** page opens.

4. In the **Title** field, enter the name of the cluster.

5. Select **On Create** check box to display the related person cluster on the create page of your client data type. By default, the check box is selected.

6. Select the **On View** check box to display the related person cluster on the view page of your client data type. By default, the check box is selected.

7. Select the **On Modify** check box to display the related person cluster on the modify page of your client data type. By default, the check box is selected.

8. Optionally, enter a description of the related person cluster.

9. Select a related person attribute to associate with the related person cluster.

10. Click **Save** to add the related person cluster to the client data type page.

## Reordering clusters

You can reorder clusters so they are presented in your client data type in the required order.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data**

The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.

Open a draft version.

- If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
- If no **In Edit** version exists, select **New Version** from the client data type row level **Actions** menu to create an in-edit version.

3. Click **Metadata tab > Clusters Action menu > Reorder Clusters**.

The **Reorder Clusters** page opens.

4. To reorder the clusters list, drag and drop the cluster upwards or downwards in to the required order.

5. Click **Save** to update the new order of clusters.

## Modifying data clusters

Update the Data Cluster that groups the data attributes in your client data type.

If you don't enter a title, no cluster title will display on the generated client data page. Specify a label for each attribute selected and specify if it should be modifiable on the second page of the Edit Data Cluster wizard.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data**

The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.

Open a draft version.

- If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
- If no **In Edit** version exists, select **New Version** from the client data type row level **Actions** menu to create an in-edit version.

3. Click **Metadata tab > Data cluster Action menu > Edit**.

The **Edit Data Cluster** page opens.

4. Enter the title of the cluster.

5. Select **On Create** check box to display data cluster on the create page of your client data type. By default, the check box is selected.

6. Select the **On View** check box to display data cluster on the view page of your client data type. By default, the check box is selected.

7. Select the **On Modify** check box to display data cluster on the modify page of your client data type. By default, the check box is selected.

8. Optionally, enter a description.

9. Select data attributes to associate with each data cluster.

10. Click **Next** to move to the next page.

11. In the **Label** fields, enter the names for each attribute to be displayed on the generated client data page.

12. Select one or more **Modifiable** check boxes to permit attribute modification on the generated client data page.

13. Select the **Use Default** check box to use the default value that is specified for the Default Value property for the related Source Attribute. If you select the Use Default check box and no default value is provided in the Data Attribute properties, the field is populated with the appropriate default values for the data type. For example, the current date is the default value for Data Attributes of type Date and Date Time, and 0 is the default value for Data Attributes of type Integer, Float and Money.
14. Select the **Use Blank** check box to display a blank value in the value set list on the generated client data page. Only shown for Value Set attributes.
15. Click **Back** to return to the previous page.
16. Click **Save** to update the data cluster on the client data type page.

## Modifying address clusters

Update the address cluster in your client data type.

If you don't enter a title, no cluster title displays on the generated client data page.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data**  
The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.  
Open a draft version.
  - If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
  - If no **In Edit** version exists, select **New Version** from the client data type row level **Actions** menu to create an in-edit version.
3. Click **Metadata tab > Address cluster Action menu > Edit**.  
The **Edit Address Cluster** page opens.
4. Enter the title of the cluster.
5. Select **On Create** check box to display the address cluster on the create page of your client data type. By default, the check box is selected.
6. Select the **On View** check box to display the address cluster on the view page of your client data type. By default, the check box is selected.
7. Select the **Modify** check box to display the address cluster on the modify page of your client data type. By default, the checkbox is selected.
8. Optionally, enter a description.
9. Select an address attribute to associate with the address cluster. Only one address attribute can be selected for each address cluster.
10. Click **Save** to update the address cluster in the client data type page.

## Modifying comments clusters

Update the comments cluster in your client data type so the correct information is displayed for care team members.

You can only have one comments attribute and one comments cluster per data type.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data**

The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.

Open a draft version.

- If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
- If no **In Edit** version exists, select **New Version** from the client data type row level **Actions** menu to create an in-edit version.

3. Click **Metadata tab > Comments cluster Action menu > Edit**.

The **Edit Comments Cluster** page opens.

4. Enter the label of the cluster.

5. Select the **On Create** checkbox to display the comments cluster on the create page of your client data type. By default, the checkbox is selected.

6. Select the **On View** checkbox to display the comments cluster on the view page of your client data type. By default, the checkbox is selected.

7. Select the **On Modify** checkbox to display the comments cluster on the modify page of your client data type. By default, the checkbox is selected.

8. Click **Save** to update the comments cluster in the client data type page.

## Modifying related person clusters

Update the related person cluster in your client data type.

If you don't enter a title, no cluster title displays on the generated client data page.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data**

The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.

Open a draft version.

- If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
  - If no **In Edit** version exists, select **New Version** from the client data type row level **Actions** menu to create an in-edit version.
3. Click **Metadata tab > Related Person cluster Action menu > Edit**.
- The **Edit Related Person Cluster** page opens.
4. Enter the title of the cluster.
5. Select **On Create** check box to display the related person cluster on the create page of your client data type. By default, the check box is selected.
6. Select the **On View** check box to display the related person cluster on the view page of your client data type. By default, the check box is selected.
7. Select the **Modify** check box to display the related person cluster on the modify page of your client data type. By default, the checkbox is selected.
8. Optionally, enter a description.
9. Select a related person attribute to associate with the related person cluster.
10. Click **Save** to update the related person cluster in the client data type page.

## Deleting clusters

Delete a cluster in your client data type so the correct information is displayed for care team members.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data**  
The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.  
Open a draft version.
  - If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
  - If no **In Edit** version exists, select **New Version** from the client data type row level **Actions** menu to create an in-edit version.
3. Click **Metadata tab > Clusters Action menu > Delete**.  
The **Delete Cluster** page opens.
4. Click **Delete** to delete the cluster from the client data type.

## Removing attributes from a data cluster

Remove attributes from a data cluster in a client data type so the correct information is displayed to care team members.

By using the **Remove** action, the attribute is removed from the cluster and is available again to associate with another cluster. The attribute is not deleted from the client data type.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data**

The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.

Open a draft version.

- If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
- If no **In Edit** version exists, select **New Version** from the client data type row level **Actions** menu to create an in-edit version.

3. Click **Metadata tab > Expand the data cluster > Attribute Action menu > Remove**.

The **Remove Attribute** page opens.

4. Click **Remove** to remove the attribute from the cluster.

## Adding an information message

Information messages display in the form of read-only labels on clusters that the care team see on client data screens at run time.

You can add information messages to data clusters but not to an address or comments cluster.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data**

The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.

Open a draft version.

- If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
- If no **In Edit** version exists, select **New Version** from the client data type row level **Actions** menu to create an in-edit version.

3. Click **Metadata tab > Data cluster Action menu > Add Information Message**

4. Enter the information message.

5. Click **Save** to add the information message to the client data type page.

## Updating an information message

Update an information message in the client data type.

The updated information message displays as a read-only label in a cluster on the generated client data page.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data**

The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.

Open a draft version.

- If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
- If no **In Edit** version exists, select **New Version** from the client data type row level **Actions** menu to create an in-edit version.

3. Click **Metadata tab > Expand the data cluster > Information message Action menu > Edit**

4. Update the information message.

5. Click **Save** to update the information message on the client data type page.

## Removing an information message

Remove an information message from a data cluster a client data type so care team members are presented with the correct information.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data**

The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.

Open a draft version.

- If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
- If no **In Edit** version exists, select **New Version** from the client data type row level **Actions** menu to create an in-edit version.

3. Click **Metadata tab > Expand the data cluster > Information message Action menu > Remove**.

The **Remove Information Message** page opens.

4. Click **Remove** to remove the information message from the cluster in the client data type.

## Reordering attributes in a data cluster

Reorder attributes and information messages in a data cluster in the client data type to present them in the required order.

The address attributes cannot be reordered.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data**

The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.

Open a draft version.

- If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
- If no **In Edit** version exists, select **New Version** from the client data type row level **Actions** menu to create an in-edit version.

3. Click **Metadata tab > Expand the data cluster > Reorder.**

4. To reorder the attributes and information messages, drag and drop them upwards or downwards in the required order.

5. Click **Save** to update the new order.

## Configuring validations for a client data type

Validations are data validity checks on client data types that must be satisfied before the client data record can be saved in the application. IBM Watson® Care Manager provides a default set of configurable validations called *standard validations*.

In Watson™ Care Manager, standard validations consist of comparison validations, dependency validations, date of birth validations, and duplicate validations. You can configure standard validations to start when care team members enter and save data on a client data Create or Modify page.

## Standard validations

By using the default set of configurable standard validations in IBM Watson® Care Manager, you can configure comparison validations, dependency validations, date of birth validations, and duplicate validations.

The following sections describe each type of standard validation in detail.

### Comparison Validation

In a Comparison Validation, a data attribute is compared with another data attribute or a literal by using comparison operators.

**Table 9. Comparison Validation Options**

Comparison Validation Option	Description
Source Field	The attribute whose value is to be compared with another data attribute value or a literal. The <b>Source</b> field is a Data Attribute.
Comparison	The operator to use in the comparison.
Target Field	<p>The attribute whose value is to be compared with another data attribute value or a literal.</p> <p> <b>Restriction:</b></p> <ul style="list-style-type: none"> <li>• The <b>Target</b> field must not point to the same attribute as the <b>Source</b> field</li> <li>• As a rule, the <b>Target</b> field must be of the same type (either Attribute Type or Attribute Data Type) to be comparable, and the <b>Target</b> field list is filtered to display only attributes that are valid for comparison with the <b>Source</b> field.</li> </ul> <p>One exception to this rule is for data attributes with a data type of <code>Integer</code>, <code>Money</code>, or <code>Float</code>. Numerical data types are mutually comparable.</p> <ul style="list-style-type: none"> <li>• You cannot use Address Attributes and Comments Attributes in Comparison Validations.</li> </ul>

The following table describes valid combinations of operators and data types for Data Attributes.

**Table 10. Supported operators and applicable Data Attribute data types in Comparison Validations**

Operator	Applicable Data Types	Description
<code>==</code>	Boolean, String, Integer, Float, Money, ValueSet, and Date.	The <i>equal to</i> operator checks that Source and Target fields have the same value. If values differ, the validation check fails. More information follows about the use of this operator for Date fields.

**Table 10. Supported operators and applicable Data Attribute data types in Comparison Validations  
(continued)**

Op- era- tor	Applicable Data Types	Description
<>	Boolean, String, Integer, Float, Money, Value Set, Date.	The <i>not equal to</i> operator checks that Source and Target fields do not have the same value. If values are the same, the validation check fails. More information follows about the use of this operator for Date fields.
<	Integer, Float, Money.	The <i>less than</i> operator checks that the <b>Source</b> field value is less than the <b>Target</b> field value. If the <b>Source</b> field value is greater than or equal to the <b>Target</b> field value, the validation check fails.
<=	Integer, Float, Money.	The <i>less than or equal to</i> operator checks that the <b>Source</b> field value is less or equal to than the <b>Target</b> field value. If the <b>Source</b> field value is greater than the <b>Target</b> field value, the validation check fails.
>	Integer, Float, Money.	The <i>greater than</i> operator checks that the <b>Source</b> field value is greater than the <b>Target</b> field value. If the <b>Source</b> field value is less than or equal to the Target field value, the validation check fails.
>=	Integer, Float, Money.	The <i>greater than or equal to</i> operator checks that the <b>Source</b> field value is greater than or equal to the <b>Target</b> field value. If the <b>Source</b> field value is less than the <b>Target</b> field value, the validation check fails.
<code>be-</code> <code>fore</code>	Date and Date Time.	The <i>before</i> operator checks that the <b>Source</b> field value is before the <b>Target</b> field value. If the <b>Source</b> field value is on or after the <b>Target</b> field value, the validation check fails.
<code>on</code> <code>or</code> <code>be-</code> <code>fore</code>	Date and Date Time.	The <i>on or before</i> operator checks that the <b>Source</b> field value is on or before to the <b>Target</b> field value. If the <b>Source</b> field value is after the <b>Target</b> field value, the validation check fails.
<code>af-</code> <code>ter</code>	Date and Date Time	The <i>after</i> operator checks that the <b>Source</b> field value is after the <b>Target</b> field value. If the <b>Source</b> field value is on or before to the <b>Target</b> field value, the validation check fails.
<code>on</code> <code>or</code>	Date and Date Time	The <i>on or after</i> operator checks that the <b>Source</b> field value is after or equal to the <b>Target</b> field value. If the <b>Source</b> field value is before the <b>Target</b> field value, the validation check fails.

**Table 10. Supported operators and applicable Data Attribute data types in Comparison Validations (continued)**

Op- era- tor	Applicable Data Types	Description
af- ter		

The following table describes more options for Comparison Validation.

**Table 11. More options for Comparison Validation**

Options	Description
Literals	<p>Select <b>Use Literal</b> to compare a source attribute (Data Attributes) against literal values. Then, type the literal value in the <b>Target Field</b> or select the value <code>Boolean</code> or <code>Date</code> data types.</p> <div style="border: 2px solid red; padding: 10px;"> <p> <b>Restriction:</b> Specify literal values only for data attributes.  As a rule, the literal value must be the same data type as the selected source attribute to be comparable.</p> </div> <p>If the data type of the Source field is <code>Boolean</code>, specify values of <code>true</code> or <code>false</code>.  If the data type of the Source field is <code>Date</code>, specify the date value or select the date by using the Date Picker.</p>
Multiple Clauses	<p>Select to compare a source attribute against multiple clauses. Then, create or delete clauses as follows:</p> <ul style="list-style-type: none"> <li>• Click <b>Add</b> to add a clause to the current validation based on the source, target, and operator fields that are selected.</li> <li>• Click <b>Delete</b> to remove multiple clauses from the comparison validation. You can delete a clause only if the clause is selected in the Clause list.</li> </ul>

**Table 11. More options for Comparison Validation (continued)**

Options	Description
	<p><b>i</b> <b>Tip:</b> You can control whether one or all clauses must succeed for the overall validation check to succeed. For more information, see the following table.</p>
Custom Message	<p>Click the <b>Custom Message</b> check box to set a custom validation message for the care team. See the Custom Validation Message section below for more information.</p>

The following table describes the mandatory options for Multiple Clauses in Comparison Validations.

**Table 12. Multiple Clause Options**

Multiple Clause Options	Description
Conjunctions	<p>Control whether any clause or all the clauses in a group are validated at run time.</p> <ul style="list-style-type: none"> <li>If you select the <b>Any Clause</b> option and if any one of the clauses passes at run time, the entire validation check succeeds.</li> <li>If you select the <b>All Clauses</b> option, all clauses must succeed for the entire validation check to succeed.</li> </ul>

## Dependency Validation

Use the Dependency Validation to enforce a dependency of a particular type between two attributes.

**Table 13. Dependency Validation Options**

Dependency Validation Option	Description
First Attribute	Select the Data Attribute, Address Attribute, or Comments Attribute on which the Second Attribute depends.

**Table 13. Dependency Validation Options (continued)**

Dependency Validation Option	Description
Second Attribute	Select the Data Attribute, Address Attribute, or Comments Attribute that depends on the First Attribute.
Dependency	<p>Select the nature of the dependency that can include one of the following values:</p> <ul style="list-style-type: none"> <li>• <b>Must enter second attribute</b> <p>If you select this value, and then the care team member enters a field value for the attribute pointed to by the First Attribute, they must also enter a field value for the attribute pointed to by the Second Attribute. If the care team member enters a value in the first field but not in the second field, this validation check fails.</p> </li> <li>• <b>Must not enter second attribute</b> <p>If you select this value, and then the care team member enters a field value for the attribute pointed to by the First Attribute, they must not enter a field value for the attribute pointed to by the Second Attribute. If the care team member enters values in both fields, this validation check fails.</p> </li> <li>• <b>At least one attribute</b> <p>If you select this value, then the care team member must enter a value into either or both fields pointed to by First Attribute and Second Attribute. If the care team member leaves both fields empty, the validation check fails.</p> </li> <li>• <b>Only one attribute</b> <p>If you select this value, then the care team member must enter a value into one or other fields pointed to by First Attribute and Second Attribute. If the care team member enters values in both fields or does not enter values in either field, this validation check fails.</p> </li> </ul>
Bidirectional	Select this check box to apply a bidirectional dependency validation for a defined dependency of <b>Must enter second attribute</b> and <b>Must not enter Second Attribute</b> .

**Table 13. Dependency Validation Options (continued)**

Dependency Validation Option	Description
	 <b>Restriction:</b> You cannot apply this property when the other dependency values are selected.

The following table describes more options in Dependency Validation.

**Table 14. More options in Dependency Validation**

Options	Description
Custom Message	Click the <b>Custom Message</b> check box to set a custom validation message for the care team. See the Custom Validation Message section below for more information.

## Date of Birth Validation

In Date of Birth Validations, the date of birth of the client is verified to be on or before a specific date.

**Table 15. Date of Birth Validation Option**

Date of Birth Validation Option	Description
Input Date	Select the data attribute with a data type of <code>Date</code> to be used in the comparison.

The following table describes more options in Date of Birth Validation.

**Table 16. More options in Date of Birth Validation**

Options	Description
Custom Message	Click the <b>Custom Message</b> check box to set a custom validation message for the care team. See the Custom Validation Message section below for more information.

## Duplicate Validation

In Duplicate Validations, client data records that are considered to be duplicated according to specified criteria are not recorded on the system.

**Table 17. Duplicate Validation Options**

Duplicate Validation Option	Description
Start Date, End Date	<p>In the <b>Start Date</b> and <b>End Date</b> fields, select the record start date and the record end dates. The values must point to a data attribute with data type of <b>Date</b>.</p> <p>If duplicate records are returned at run time, the validation check fails.</p>
Other Attributes	<p>Optional: specify a list of other attributes whose values are to be compared for duplicates with any Date Range provided.</p> <p>If records in the selection set have attribute values that are equal to the values for the attributes in the <b>Other Attributes</b> list (specified in the Client Data Create or Modify screens), the validation check fails.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;">  <b>Note:</b>        If multiple attributes are in the list, can take the following actions to check for duplicates:       <ul style="list-style-type: none"> <li>• To check each attribute in the select list, select <b>Check each attributes individually</b>.</li> <li>• To check that all the attributes in the selection list are unique, select <b>Check attributes together</b>.</li> </ul> </div>
Validate Date Range and Other Attributes together	<p>If you select this property, at run time, the Duplicate Validation checks for client data records that have overlapping Start and End dates and attribute values that are equal to the values for attributes in the <b>Other Attributes</b> list (specified in the Client Data Create or Modify screens). If duplicate client data records are returned, the validation check fails.</p> <p>If you do not select this property, at run time, the Duplicate Validation either checks for client data records that have overlapping Start and End dates or attribute values that are</p>

**Table 17. Duplicate Validation Options (continued)**

Duplicate Validation Option	Description
	equal to the values for attributes in the <b>Other Attributes</b> list (specified in the Client Data Create or Modify screens). If duplicate client data records are returned, the validation check fails.

The following table describes some additional available options in Duplicate Validation.

**Table 18. More options in Duplicate Validation**

Options	Description
Custom Message	Click the <b>Custom Message</b> check box to set a custom validation message for the care team. See the Custom Validation Message section below for more information.

## Custom Validation Message

To set a custom validation message for a validation type, specify the following options:

**Table 19. Custom validation message options**

Validation Mapping Options	Description
Message	Enter the text to be used in the validation message. You can use parameters with attribute names to be placeholders in the validation message. Use this format: opening curly brace, parameter number, closing curly brace, for example {0}, {1}.
Message ID	Enter the string to use to identify the Message property value. Locale-specific formats can be specified. <ul style="list-style-type: none"> <li>• The string identifier that you specify must be a unique and valid for the client data type version, for example, <code>My_EvidenceTypeVersion.ComparisonValidation.Message</code></li> <li>• The string identifier that you specify must not contain the equals character (=) or white space characters.</li> </ul>
Message Parameters	Select from an ordered list of Data Attributes, Address Attributes, or Comment Attributes to be used in the message.

At run time, message parameter values replace the parameter placeholders that you specify in the message, for example:

Suppose that you set the **Message** property to the following values:`Earns ${0} {1} working for {2}` and you set the **Message Parameters** property to the following values: `incomeAmount, incomeFrequency, employerName`, the runtime message (given the appropriate data in the client data record) is similar to the following display: `Earns $123.50 weekly working for Midway Services Inc.`

To display an apostrophe in a message, you must enter quotation marks as follows:`{0}'s DOB {1} is after the attribute date {2}`. The message output displays as in the following example: `John's DOB 01/01/1992 is after the attribute date 01/01/1991`. If you enter an apostrophe instead of quotation marks, the apostrophe and the variables are not displayed in the message output: `Seans DOB {1} is after the attribute date {2}`.

## Defining summary description for a client data type

Good summary text helps care team members to review client data records with more insight. You can add and edit a summary description for the client data type version that will be displayed on the generated client data page and the summary card, if configured.

Configure Summary Description for every client data type version to enable care team members to differentiate versions of client data records by description.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data**

The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.

Open a draft version.

- If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
- If no **In Edit** version exists, select **New Version** from the client data type row level **Actions** menu to create an in-edit version.

3. Click **Summary Description cluster > Edit**

The **Edit Summary Description** page opens.

4. In the **Start Date** field, select the value to be displayed for the period start date of the client data type on the Client Data page.
5. In the **End Date** field, select the value to be displayed for the period end date of the client data type on the Client Data page.
6. Select from a list of data attributes to be used in the message. Select **Add** to add the parameter to the table.
7. To delete a parameter from the summary description, select one or more check boxes beside the parameter and select **Delete**.

8. In the **Message** field, enter the message you want displayed at run time. You can specify client data attribute values to include as parameters in the summary message by adding the order number inside curly brackets, for example {0}.
9. In the **Message ID** field, enter a valid Summary Description ID. String must not contain '=', ':' or white space characters.
10. Click **Save** to add the summary description.

## Defining supporting information for a client data type

You can define the online help on the create and modify pages of the client data so users can understand the purpose of the client data type and its attributes.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data**  
The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.  
Open a draft version.
  - If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
  - If no **In Edit** version exists, select **New Version** from the client data type row level **Actions**menu to create an in-edit version.
3. Click  
**Supporting Information > Online Help cluster > Edit**  
The **Edit Online Help** page opens.
4. Optionally, specify the online help text to display on the Create and Modify Pages for a client data type.
5. Click **Save**.

## Editing notes for a client data type

You can add and edit a note so that other administrators can understand the purpose of the client data type. This property is for administrative annotation purposes only. The client data infrastructure does not use the property and the Client Data screens do not display it at run time.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data**

The tabs in the Client Data library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.

Open a draft version.

- If an **In Edit** version exists, click the client data type name to open the **In Edit** version.
- If no **In Edit** version exists, select **New Version** from the client data type row level **Actions**menu to create an in-edit version.

3. Click **Supporting Information > Note cluster > Edit**

The **Edit Note** page opens.

4. Optionally, edit or enter a note for a client data type.

5. Click **Save**.

## Activating client data type versions

After you model the metadata of a client data type and create the user interface page to contain the data fields and labels that you want to display at run time, you're ready to activate the current version of the client data. An activated client data type version is immediately available to the care team to use.

Client data types are versioned with different effective dates where each version of a client data type is effective from a particular date, and remains effective until the next version is created. Versioning client data types allows information that is recorded for a client data type to evolve over time. By creating different versions of a client data type, you can capture discrete changes in the client's data and maintain that information for particular time periods.

Multiple versions of client data types can exist in the application if each version has a different effective date. Only one client data type version can be active for a particular effective date.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data**.

The tabs in the **Client Data** library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.

3. From the **Actions** menu for the client data type version, click **Activate**.

Alternatively, if you open the in edit version of the client data type, you can select **Activate** from the action menu on the metadata or supporting information tabs.

4. In the activation modal, enter comments that describe your changes to the version, and then click **Yes**.

The comments are displayed with the version's activation date in the data type's Details cluster.

## Sharing client data types with external systems

You can set sharing options to allow Watson™ Care Manager to receive, and share, client information that is captured in respect of a client data type with external systems. You can download the API definition document for a shared client data type and distribute it to the systems integrator for your organization, so that they can update integrations to use the latest version of the client data type. You can stop sharing a configurable client data type to prevent the sharing of its data with external systems.



### Important:

Depending on your changes, each time you modify or create a new version of a shared client data type version, you may need to redistribute its API definition document to your organization's integrator. Otherwise, existing integrations might fail. For more information, see [Updates to client data types and external systems \(on page 191\)](#).

## Sharing a client data type version

You can allow client data type version sharing with a system external to Watson™ Care Manager, for example, a hospital information system.

Before you share a client data type version, ensure that an external system reference is associated with the client data type so that external systems can uniquely identify the client data type when sharing data with Watson™ Care Manager via an API.

You can share only client data types with an **Active** status. In addition, only one shared version of a particular client data type can exist. When you share a new version, Watson™ Care Manager automatically stops sharing any existing version of the client data type that is already shared.

After you share a client data type version, Watson™ Care Manager, you can share its API definition document with the systems integrator for your organization.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data**. The tabs on the **Client Data** page contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.
3. Expand a configurable client data type.
4. Click the **Actions** menu of an **Active** configurable client data type version, and select **Share**.  
The **Share Client Data Version** page opens.
5. Click **Share** to share the client data type version.

[Sharing the API document for a client data type \(on page 189\)](#)

## Sharing the API document for a client data type

When you share a configurable client data type version, Watson™ Care Manager generates an API definition document in JSON format. You can download the API document to distribute to the relevant systems integrator for your organization.

The document contains the REST API calls and structure that Watson™ Care Manager requires to receive client information captured in respect of the client data type from external systems. Your integrator uses the API document to understand what data is expected from the receiving system and the format of the data.



### Note:

The option to share the API document for a configurable client data type version is available only when the client data type version is **Active** and shared. The API document is compatible only with Version 2.0 of the Swagger Editor.



### Important:

Whenever you modify or create a new version of a client data type that is shared with external systems, you may need to redistribute its API definition document to your organization's integrator. Otherwise, existing integrations might fail. For more information, see [Updates to client data types and external systems \(on page ▶\)](#).

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data**.  
The tabs in the **Client Data** library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.
3. From the **Actions** menu for a configurable client data type that is **Active** and shared, click **Share Document**. The **Share Document** page opens.
4. Click **Download**.
5. Browse to where you want to store the file on your computer.
6. Distribute the document to the systems integrator for your organization.

## Stopping client data type version sharing

You can stop sharing a configurable client data type version to prevent sharing of client information captured in respect of the version with external systems.

If you stop sharing a client data type version that is already in use in existing integrations, you might cause existing integrations to fail. Watson™ Care Manager will no longer share information that is recorded for clients in respect of the client data type version with external systems.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data**. The tabs on the **Client Data** page contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.
3. Expand a configurable client data type.
4. Click the **Actions** menu of an **Active** and shared configurable client data type version, and select **Stop Sharing**.  
The **Stop Sharing Client Data Version** page opens.
5. Click **Stop Sharing** to stop sharing the client data type version with external systems.

## Cloning a client data type version as a template for a new version

You can copy an existing, active client data type version as a baseline for a new version of the data type. The metadata of the active client data type version is cloned in the new In-Edit version that you create. You can subsequently modify the modeled attributes for that client data type in In-Edit version.

Client data types are versioned with different effective dates where each version of a client data type is effective from a particular date, and remains effective until the next version is created. Versioning client data types allows information that is recorded for a client data type to evolve over time. By creating different versions of a client data type, you can capture discrete changes in the client's data and maintain that information for particular time periods.

Multiple versions of client data types can exist in the application if each version has a different effective date. Only one client data type version can be active for a particular effective date.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data**.  
The **Client Data** page opens.
3. Select a client data type, and from the **Actions** for the data type, click **New Version**.  
The new version of the client data type is created in a draft or `In Edit` state that you can modify. The metadata of the new version is cloned from the existing version. Alternatively, if you open the activated version of the client data type, you can select **New Version** from the action menu on the metadata or supporting information tabs.

4. To configure the metadata for the new client data type version, modify the cloned data attributes and properties.

Follow the steps in previous topics to define the attributes for the client data type.

5. Activate the client data type version.

## Maintaining client data type versions

As an organization's requirements change, you might want to modify or delete some of the attributes, clusters or fields that you defined in the existing client data type version. You can revise the structure of the client data type version so long as it is still in an In-Edit draft state.

## Updates to client data types and external systems

Occasionally, you might need to create a new version of a client data type or modify an existing version. If the client data type version is shared with an external system, some changes that you make to the client data type version require you to redistribute its API definition document to your organization's integrator.

### Overview



#### Important:

If your changes impact existing integrations, you must follow your organization's internal process to make the latest version of the client data type API definition document available to your organization's integrator. Your integrator uses the API definition document to sync the information that is captured in respect of your latest client data type version with the external system.

### Which updates impact integrations?

The table lists updates that you can make to a client data type version and whether they impact existing integrations.

**Table 20. Client data type updates**

	Update	Does this update impact integrations? (Yes/No)	More information
<b>Attributes</b>	Adding a mandatory attribute	Yes	<a href="#">Defining attributes for a client data type (on page 157)</a>

**Table 20. Client data type updates (continued)**

	<b>Update</b>	<b>Does this update impact integrations? (Yes/No)</b>	<b>More information</b>
	Deleting a mandatory attribute	Yes	<a href="#">Deleting attributes from a client data type version (on page 194)</a>
	Adding an optional attribute	Yes	<a href="#">Defining attributes for a client data type (on page 157)</a>
<b>Validations</b>	Adding a new validation	Yes	<a href="#">Configuring validations for a client data type (on page 176)</a>
	Updating an existing validation	Yes	
	Deleting a validation	No	

## Troubleshooting

If existing integrations fail because you did not make the API document for a new client data type version available to your organization's integrator, stop sharing your new version, then share a previous version of the client data type that you know works.

## Modifying client data types

You can modify the details of configurable client data types that you have defined in the application. You cannot modify the client data types that come with the product by default.

After a client data type is created, you cannot modify its logical name. The logical name is a unique name that other configuration components use to identify and reference the client data type. With the exception of its logical name, you can update all details for a client data type.



### Important:

If not previously configured, you can associate a new external system reference with the client data type. When sending a client data type as an API attribute, the external system identifies the client data type by its external system reference. You cannot associate an external system reference with a client data type that was previously used for another client data type.



If you update an existing external system reference that was previously configured, and is already in use in existing integrations, you might cause existing integrations to fail.



**Note:**

When a custom client data type Name that is marked to be included in the Share Care Plan and has at least one active version is updated, the custom client data type updated name is not reflected in the Share Care Plan template home page. Your organization must manually update the Display Name in order to accommodate the updates.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data**.

The tabs on the **Client Data** page contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.

3. Click the **Actions** menu of a configurable client data type, and click **Edit**. The **Edit Client Data Type** page opens. Alternatively, if you open the in edit version of the client data type, you can select **Edit** from the Details cluster.
4. Optionally, select a **Category**, which is used for reporting and evaluation purposes.
5. Optionally, enter an **External System Reference** number, which is a unique reference number of up to 20 alphanumeric characters.
6. Select the **Include in Share Care Plan** check box to include the custom client data type on the printed Share Care Plan PDF.
7. Optionally, enter a **Description**.
8. Click **Save**.

---

#### Related information

[Creating client data types \(on page 156\)](#)

## Deleting client data types

If a configured client data type is incorrect or obsolete, you can delete it. However, you can delete a client data type only if it has no active versions.

Ensure that you delete any custom summary card configuration that uses a client data type before you delete a client data type that is displayed in a custom summary card.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data**.

The tabs on the **Client Data** page contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.



**Restriction:**

You cannot modify the client data types that are provided by default with the application.

3. Click the **Actions** menu of the client data type, and click **Delete**. The **Delete Client Data Type** page opens.
4. Click **Yes** to confirm that you want to delete the client data type.

---

#### Related information

[Creating client data types \(on page 156\)](#)

Configuring an Addiction Counseling client data type (on page [156](#))

## Deleting attributes from a client data type version

You can remove attributes of any type from a client data type version.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data**.

The tabs in the **Client Data** library contain a list of configurable and non-configurable client data types. Configurable data types are displayed by default.

3. Expand the client data type and click the Effective From hyperlink to open the In Edit draft version of the data type.

4. Click

**Metadata tab > Attribute cluster > Delete**

The **Delete Attribute** page opens.

5. Click **delete** to delete the attribute.

If you delete an attribute that is referenced in validations or summary information, validations, fields that reference the attributes, related default values, and data type options are removed from the client data type version.

---

#### Related information

[Creating client data types \(on page 156\)](#)

## Deleting client data type versions

If a configured client data type version is incorrect or obsolete, you can delete it. However, you cannot delete a client data type version if the version contains client data that is in use in the application.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data**.
3. Select a client data type, and from the **Actions** for the data type, click **Delete**.
4. Click **Yes** to confirm that you want to delete the client data type version.

---

#### Related information

[Activating client data type versions \(on page 187\)](#)

[Configuring an Addiction Counseling client data type \(on page 187\)](#)

## Configuring data sources

You can configure a library of client data types to define the exact client data that can be captured and stored in IBM Watson® Care Manager. So that the care team knows where data types originated, you can associate configured sources and original source systems with each data type.

A library of non-configurable client data types comes with the product to contain the attributes that the organization wants to record in respect of a client's contact details, demographic information, personal and health background, clinical records, and vitals. In addition, you can configure General client data types (for example, Alerts, Assessments) and configured client data types (for example, Family History) to add to the library.

So that the care team knows where client data types originated, you can associate configured sources and original source systems with each data type (non-configurable, general, configured). If required, you can configure new sources to add to the library of configured sources that comes with the product by default. You can also add to the default library of original source systems that comes with the product.

---

#### Related information

[Default non-configurable client data types in Watson Care Manager \(on page 152\)](#)

[Getting started with configuring client data \(on page 187\)](#)

## Associating data types with configured sources

For each data type that is listed in the library, you can manage and maintain its source by associating the source and original source system (if applicable) with each data type.

You can enable or disable the association between sources and data types so that care team members can or cannot select the source information when they work with data types.

## Modifying configured sources for data types

So that you maintain current data sources for data types, you can update the source and original source system for a selected data type.

General data types relate to data types that are configured for your organization in IBM Watson Care manager, for example, Alerts, or Assessment. Non-configured client data types come with the product by default and define the data that can be captured and stored for a client's contact details, demographic information, personal and health background, clinical records, and vitals. Configured client data types are custom data types that are created to enable the care team to capture specific client information, for example, their Family History.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **General > Source Systems**.

Configured data types are listed. The **Display** state indicates whether sources for the listed data types are currently **Shown** and available to the care team to use, or **Hidden** and unavailable.

3. From the **Actions** menu of a data type, update the sources for the data type by choosing from the following options:

- Select **Edit**.

From the **Sources** menu, select one or more of the configured values that indicate the source of the data, for example, Reported by team. This selection is mandatory.

From the **Original Source Systems** menu, if applicable, select one or more of the configured values to indicate where the data originated external to Watson™ Care Manager. This selection is optional.

Click **Save**. After you save the updated sources for the data type, the configured data type with related source information can be made available to team to select when creating data types. Sources associated with existing data types remain unchanged in the application.

- Select **Show** or **Hide** to make the sources for the data type available or unavailable to the care team.

## Configuring sources for data types

Care team members can select a data source for a data type. You can manage a configurable list of sources of data to associate with data types in the library.

General data types relate to data types that are configured for your organization in IBM Watson® Care Manager, for example, Alerts, or Assessment. Non-configured client data types come with the product by default and define the data that can be captured and stored for a client's contact details, demographic information, personal and health background, clinical records, and vitals..

You can create or update a source to associate with data types, and you can reorder the list of configured sources for display. For the data types that can be captured during a client's registration (example: Address, Phone Number, Email Address), we suggest that you create common Source values for each of the data types for the care team to apply. Use the **Show** and **Hide** actions to display a source to the care team or hide it from view.

## Adding sources

By default, a library of sources comes with the product to allow the care team to associate sources with a data type that they are creating. If a source that is already configured does not suit the needs of your organization, you can add new sources to the library.

The sources list items that are available by default are as follows: Analytics (External), Analytics (Internal), Chart, Encounter, Hospital Information System, Lab, Other, Outside Provider, Payer, Practice Management System, Provider Management System, and Self Reported.

You can associate an external system reference with the source that you are adding so that incoming data from an external API can be mapped to the configured source in Watson Care Manager.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **General > Source Systems**.

The tabs on the **Source Systems** page contain a list of data types, sources, and original source systems. Data types are displayed by default.

3. Select the **Source** tab.

The library of configured sources displays. The **Display** state indicates whether configured sources are currently **Shown** and available to the care team to use, or **Hidden** and unavailable.

4. Click **New**.

The **New Source** page opens.

5. Enter a unique name that does not duplicate any existing source in the library.

6. In the **External System Reference** field, enter a unique reference number of up to 20 alphanumeric characters to associate with the source that you are adding.  
When sending a source as an API attribute, the external system identifies the source by its external system reference.
7. From the **General** menu, associate the source that you are creating with one or more general data types that are configured for your organization. Select All to associate the source with all the configured data types in the General category, including custom data types that are created to enable the care team to capture specific client information, or select individual data types from the list.



**Note:**

Choosing the Assessments data type associates the source with both Score Only and Script assessment types.

8. From the **Non-configured client data** menu, associate the source that you are creating with one or more of the client data types that come with the product by default. Select All to associate the source with all the non-configured client data types in the list, or select individual data types in the list.
9. Click **Save** to add the sources for the selected data types to the library of sources.

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#### Related information

[Configuring external system references \(on page 241\)](#)

## Modifying sources

So that you can maintain current sources for data types, you can edit the name of a configured source and apply it to one or more data types.

You can associate an external system reference with the source that you are adding so that incoming data from an external API can be mapped to the configured source in Watson™ Care Manager.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **General > Source Systems**.  
The tabs on the **Source Systems** page contain a list of data types, sources, and original source systems. Data types are displayed by default.
3. Select the **Source** tab.

The library of configured sources displays. The **Display** state indicates whether configured sources are currently **Shown** and available to the care team to use, or **Hidden** and unavailable.

4. From the **Actions** menu of a listed source, choose from the following options:

- Select **Edit**. The **Edit Source** page opens.

Enter a unique name that does not duplicate any existing source in the library.

In the **External System Reference** field, enter a unique reference number of up to 20 alphanumeric characters to associate with the source that you are updating. When sending a source as an API attribute, the external system identifies the source by its external system reference.

From the **General** menu, associate the source that you are creating with one or more general data types that are configured for your organization. Select All to associate the source with all the configured data types in the General category, including custom data types that are created to enable the care team to capture specific client information, or select individual data types from the list.



**Note:**

Choosing the Assessments data type associates the source with both Score Only and Script assessment types.

From the **Non-configured client data** menu, associate the source that you are creating with one or more of the client data types that come with the product by default. Select All to associate the source with all the non-configured client data types in the list, or select individual data types in the list.

From the **Configured client data** menu, associate the source that you are creating with one or more of the data types in the Configured category. Select All to associate the source with all the configured client data types in the list, or select individual data types in the list.

Click **Save**. After you save the updated sources for the data type, the configured data type with related source information can be made available to team to select when creating data types. Sources associated with existing data types remain unchanged in the application.

- Select **Show** or **Hide** to make the sources for the data type available or unavailable to the care team.

5. To reorder the sequence of sources, click **Reorder**.

Drag and drop the sources to position them in your preferred order.

## Configuring original source systems for data types

Care team members can select an original source system to indicate where data originated external to Watson™ Care Manager, for example, via a hospital information system. You can manage a configurable list of original source systems to associate with data types in the library.

General data types relate to data types that are configured for your organization in IBM Watson® Care Manager, for example, Alerts, or Assessment. Non-configured client data types come with the product by default and define the data that can be captured and stored for a client's contact details, demographic information, personal and health background, clinical records, and vitals.

You can create or update an original source system to associate with data types, and you can reorder the list of original source systems for display. For the data types that can be captured during a client's registration (example: Address, Phone Number, Email Address, Goals), we suggest that you create common Original Source System values for each of the data types for the care team to apply. Use the **Show** and **Hide** actions to display an original source system to the care team or hide it from view.

## Adding original source systems

By default, a library of original source systems come with the product to allow the care team to associate data types with the system where the data was recorded for the very first time. If an original source system that is already configured does not suit the needs of your organization, you can add new original source systems to the library.

The original source systems list items that are available by default are as follows: Watson™ Care Manager, Other.

You can associate an external system reference with the original source system that you are adding so that incoming data from an external API can be mapped to the configured original source system in Watson™ Care Manager.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **General > Original Source Systems**.

The tabs on the **Source Systems** page contain a list of data types, sources, and original source systems. Data types are displayed by default.

3. Select the **Original Source Systems** tab.

The library of configured original source systems displays. The **Display** state indicates whether configured original source systems are currently **Shown** and available to the care team to use, or **Hidden** and unavailable.

4. Click **New**.

The **New Original Source System** page opens.

5. Enter a unique name that does not duplicate any existing source system in the library.
6. In the **External System Reference** field, enter a unique reference number of up to 20 alphanumeric characters to associate with the original source system that you are adding.  
When sending an original source system as an API attribute, the external system identifies the original source system by its external system reference.
7. From the **General** menu, associate the original source system that you are creating with one or more general data types that are configured for your organization. Select All to associate the original source system with all the configured data types in the General category, including custom data types that are created to enable the care team to capture specific client information, or select individual data types from the list.



**Note:**

Choosing the Assessments data type associates the original source system with both Score Only and Script assessment types.

8. From the **Non-configured client data** menu, associate the original source system that you are creating with one or more of the client data types that come with the product by default. Select All to associate the original source system with all the non-configured client data types in the list, or select individual data types in the list.
9. Click **Save** to add the original source system for the selected data types to the library of original source systems.

---

#### Related information

[Configuring external system references \(on page 241\)](#)

## Modifying original source systems

So that you can maintain current original source systems for data types, you can edit the name of a configured original source system and apply it to one or more data types.

General data types relate to types of client data that are configured for your organization in IBM Watson Care manager, for example, Alerts, or Assessments.

You can associate an external system reference with the original source system that you are updating so that incoming data from an external API can be mapped to the configured original source system in Watson™ Care Manager.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **General > Source Systems**.

The tabs on the **Source Systems** page contain a list of data types, sources, and original source systems. Data types are displayed by default.

3. Select the **Original Source System** tab.

The library of configured original source systems displays. The **Display** state indicates whether configured original source systems are currently **Shown** and available to the care team to use, or **Hidden** and unavailable.

4. From the **Actions** menu of a listed original source system, choose from the following options:

- Select **Edit**. The **Edit Original Source System** page opens.

Enter a unique name that does not duplicate any existing original source system in the library.

In the **External System Reference** field, enter a unique reference number of up to 20 alphanumeric characters to associate with the original source system that you are updating. When sending an original source system as an API attribute, the external system identifies the original source system by its external system reference.

From the **General** menu, associate the original source system that you are creating with one or more general data types that are configured for your organization. Select All to associate the original source system with all the configured data types in the General category, including custom data types that are created to enable the care team to capture specific client information, or select individual data types in the General category list.



**Note:**

Choosing the Assessments data type associates the original source system with both Score Only and Script assessment types.

From the **Non-configured client data** menu, associate the original source system that you are creating with one or more of the client data types that come with the product by default. Select All to associate the original source system with all the non-configured client data types in the list, or select individual data types in the list.

Click **Save**. After you save the updated original source system for the client data type, the configured data type with related source information can be made available to team to

select when creating data types. Original source systems associated with existing data types remain unchanged in the application.

- Select **Show** or **Hide** to make the original source system for the data type available or unavailable to the care team.

5. To reorder the sequence of original source systems, click **Reorder**.

Drag and drop the source systems to position them in your preferred order.

## Configuring consent types

Consent types enable a care team to categorize consent records that they create for clients by their information type. You can create a library of consent types for your organization and, for each consent type, you can set a flag that enables sharing of consent records of that type across organization units (assuming organization units are enabled). You can edit the name of a consent type that you create. You can make a consent type available to care teams to use, or hide it from view.

To support the migration of existing consent records, and consent records that are sent to IBM Watson® Care Manager, the following consent types come with the product by default: **Not Set** and **Community Consent**. You cannot edit the **Not Set** consent type.

### Creating consent types

You can configure a consent type for a care team to associate with a client's consent records, for example, Medical Records Consent. For each consent type, you can enable sharing of consent records of that type across organization units (assuming organization units are enabled).

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Consent Types**.

Configured consent types are listed. The **Display** state indicates whether consent types that are configured in the application are currently available for use by the care team. By default, the **Not Set** type is hidden.

3. Click **New**.

The **New Consent Type** page opens.

4. Name the type of consent, and check **Share with Organization** to enable the care team to record the client's agreement to share consent documents of this type across organization units.

Each consent type must have a unique name.

5. Click **Save**.

## Modifying consent types

Except for the **Not Set** consent type, you can rename a configured consent type that needs correction or more context. For each consent type, you can enable or prevent sharing of consent records of that type across organization units (assuming organization units are enabled).

You cannot edit the **Not Set** consent type that comes with the product by default. The **Not Set** consent type is automatically applied to the migration of existing consent records and is hidden from view by default.

You can show or hide each consent type to make the type available or unavailable to the care team to use. You can reorder the sequence in which consent types are displayed.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Consent Types**.

Configured consent types are listed. The **Display** state indicates whether consent types that are configured in the application are currently available to the care team to use.

3. From the **Actions** menu of a consent type, modify the type by choosing from the following options:
  - Select **Edit**. Rename the consent type and check **Share with Organization** to enable the care team to record the client's agreement to share consent documents of this type across organization units. Prevent sharing of consent records of specific types by clearing the check box. Click **Save**. After you save the consent type, the name is applied to all existing client records associated with that consent type.
  - Select **Show or Hide** to show or hide the consent type to the care team. The **Show or Hide** action is available only when the consent type is hidden or shown respectively.
4. To reorder the sequence of consent types, click **Reorder**. Drag and drop the consent types to position them in your preferred order.

## Configuring client summary cards

You can review the care team roles that are configured in the application and manage the client summary cards that are displayed for each care team role. Cards are displayed on the client's **Summary** page.

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### Related information

[Summary \(on page ▶\)](#)

## Client summary cards

Summary cards summarize important information about a client for the care team, and can be shown or hidden to show the most relevant information.

The following cards are available to be shown on the Summary and are displayed by default.

### Care team

A central view of Active primary care team members (sorted alphabetically) followed by core team members who were most recently assigned to the client's care (sorted alphabetically). A primary care team member is responsible for the client's care plan and programs. Core care team members are considered key to the delivery of care for a client and typically interact with the client regularly. By default, up to five care team members are listed by the dates that they were added to the care team. However, your administrator may have configured the card to display more than five records.

### Actions

The numbers of client actions and care team actions on the client's care plan, showing how many actions are open or completed.

### Programs

The most recent programs that the client was assigned to or enrolled in. By default, up to five programs are listed by status dates. However, your administrator may have configured the card to display more than five records. Programs that were most recently assigned to the client are listed first, and then programs that the client was most recently enrolled in.

### Assessments

The most recent assessments and their scores. By default, up to five assessments are listed by the dates that the assessments were ran. However, your administrator may have configured the card to display more than five records.

### Goals

A summary of the most recent goals added to the client's care plan. By default, up to five goals are listed by the dates that they were added to the care plan. However, your administrator may have configured the card to display more than five records.

### Barriers

The most recent barriers on the client's care plan. Barriers are issues that can prevent a client from achieving their care plan goals or actions, or from using services. By default, up to five barriers are listed by the dates they were added to the care plan. Active barriers are

listed first, and then resolved barriers. However, your administrator may have configured the card to display more than five records.

### Risks

A summary of risks on the client's care plan and their most recent scores. By default, up to five risks are listed by alphabetical order. However, your administrator may have configured the card to display more than five records. For risks with multiple scores recorded, the most recent score is displayed.

### Conditions

The most recent conditions on the client's care plan. Conditions might be classified as primary or secondary to indicate their level of importance or priority to address. By default, up to five conditions are listed by start dates. However, your administrator may have configured the card to display more than five records.

### Latest Note

An excerpt from the most recently modified client note in its most recent state: Draft, Ready for review, or Final.

### Latest Touchpoint

An excerpt from the most recent client touchpoint in its most recent state: Draft, Ready for review, or Final. A touchpoint is a contact between the care team and the client or someone in relation to the client.

### Health Background

The most recently recorded health background information about a client. By default, up to five records are listed by the dates they were added or updated along with the name of the person who recorded or last updated the information. However, your administrator may have configured the card to display more than five records.

### Current Medications

The most recently recorded current medications information about a client. By default, up to five records are listed by medication name, the medication strength and the recommended frequency that the medication is taken. However, your administrator may have configured the card to display more than five records.

### Personal Background

The most recently recorded personal background information about a client. By default, up to five records are listed by the dates they were added or updated along with the name of

the person who recorded or last updated the information. However, your administrator may have configured the card to display more than five records.

### **Social Background**

The most recently recorded social background information about a client. By default, up to five records are listed by the dates they were added or updated along with the name of the person who recorded or last updated the information. However, your administrator may have configured the card to display more than five records.

### **Tags**

The most recently recorded tags for a client. By default, up to five records are listed by the dates they were added or updated along with the name of the person who recorded or last updated the information. However, your administrator may have configured the card to display more than five records.

The following cards are available to be shown on the Summary, but are hidden by default:

#### **Latest Private Note**

An excerpt from the most recently modified Private or Private to Role type note that relates to the client. The name of the author who created the note is displayed. You can click the **See More** link to view the complete note and comments.

#### **Current Actions**

A summary of client and care team actions that are in progress. Up to five actions are listed. Actions with end dates are listed first by the nearest end dates, and then actions with no end dates listed by the start dates.

#### **Planned Actions**

A summary of client and care team actions that have not started. Up to five actions are listed by their start dates.

#### **Services**

A summary of services and providers that have been scheduled for the client. By default up to five records are configured to be shown. The service name is displayed, followed by the provider name.

## Configuring the default display of client summary cards for all care team roles

You can manage the display of a library of summary cards on the client's Summary page. Unless you configure cards to be hidden from view, all care team roles can see the client summary cards that you set to display.

Client summary cards display horizontally across the client's Summary page and wrap the page as required. The default library of client summary cards is as follows: Goals, Actions, Care team, Programs, Assessments, Latest Touchpoint, Latest Note, Conditions, Barriers, Risks, Social Background, Health Background, Personal Background, Notes Highlights, Current Actions, Planned Actions, Latest Private Note and Tags. Summary cards are shown in the order that they are listed but you can reorder the cards if required.

To show configurable client data on the client's Summary page, add your own configurable summary cards (custom cards). For most of the cards in the library, you can specify the configured number of client data records that displays on the card on the client's Summary page. A **Not Applicable** value on cards means that you cannot specify the number of records for the card.

You can configure summary cards to be shown to all care team roles on the client's Summary page or to be hidden from view.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data > Client Summary Cards**.

On the **Default Configuration** tab, the library of default summary cards that come with the product are displayed.

3. To add a custom card to the library, complete the following steps.

- a. Click **New**. The **New Card** page opens.
- b. Select a type of client data to display.



### Note:

This list displays only the *active* client data types that are not displayed on a card already. If no new data types are configured in the system, this list is blank.

- c. From the **Number of Records** menu, select the number of data records to display on the client summary card. The default selection is 5 records in a range from 1 to 10.
- d. Click **Save**.

4. Edit the number of records that displays on a summary card by selecting **Edit** from the **Actions** menu of the card. Then, select the number of records to display in the range of 1 to 10.  
You cannot edit these cards: Actions, Latest Note, Latest Touchpoint, Note Highlights, and Latest Private Note.
5. Delete an incorrect or obsolete summary card by selecting **Delete** from the **Actions** menu of the card.  
You can only delete configurable client summary cards (custom cards).
6. To hide or show a client summary card to all care team roles, from the **Actions** menu of a card, select **Hide** or **Show** respectively.  
You can change the card display for a specific role on the **Role-based Configurations** tab.
7. To reorder the sequence of summary cards, click **Reorder**. Drag and drop the summary cards to position them in your preferred order.

## Customizing the display of client summary cards for specific care team roles

If the default configuration does not suit the card display for a specific care team role, you can configure a customized display of summary cards for the role. Unless you configure cards to be hidden from view, the care team role can see the client summary cards that you set to display.

Client summary cards display horizontally across the client's Summary page and wrap the page as required. The default library of client summary cards is as follows: Goals, Actions, Care team, Programs, Assessments, Latest Touchpoint, Latest Note, Conditions, Barriers, Risks, Social Background, Health Background, Personal Background, Notes Highlights, Current Actions, Planned Actions, Latest Private Note and Tags.

By default, each listed care team role inherits the client summary card configuration in the **Default Configuration** tab. On this page, you can change the default display status of a card so that a card is hidden or displays to care team members with a specific role.

Summary cards are shown on the client's Summary page in the order that they are listed but you can reorder the cards if required.

For most of the cards in the library, you can specify the configured number of client data records that displays on the card on the client's Summary page. A **Not Applicable** value on cards means that you cannot specify the number of records for the card.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data > Client Summary Cards**.

3. Click the **Role-based Configuration** tab.

The list of care team roles that displays on this page refreshes as roles are created, edited, or deleted on the **Care Team Roles** page.

4. Click any listed role name hyperlink to view and modify the shown or hidden cards that are configured for that role.

The home page for the selected care team role opens.

5. Edit the number of records that displays on a summary card by selecting **Edit** from the **Actions** menu of the card. Then, select the number of records to display in the range of 1 to 10.

You cannot edit these cards: Actions, Latest Note, Latest Touchpoint, Note Highlights, and Latest Private Note.

6. To hide or show a client summary card to a specific care team role, from the **Actions** menu of a card, select **Hide** or **Show** respectively.

7. To reorder the sequence of summary cards, click **Reorder**. Drag and drop the summary cards to position them in your preferred order.

## Copying a role-based summary card configuration

If you customize the display of summary cards for a specific care team role, you can replicate that configuration for another care team role by creating a copy.

If other care team roles need to have the same card configuration, copy a configuration from one care team role to another care team role. You can copy a card configuration only if multiple care team roles are configured in the application.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data > Client Summary Cards**.

3. Click the **Role-based Configuration** tab.

The list of care team roles that displays on this page refreshes as roles are created, edited, or deleted on the **Care Team Roles** page.

4. From the **Actions** menu of the care team role, click **Copy from role**.

The **Copy from Role** page opens.

5. Of the listed roles that are configured in the application, select the one to which you want to copy the configuration.

6. Click **Save**.

## Resetting role-based summary cards to the default configuration

If you customize the display of summary cards for a specific care team role, you can revert that display to be the same as the default card configuration.

For any configured care team role, you can reset the summary card display to the default card configuration.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data > Client Summary Cards**.
3. Click the **Role-based Configuration** tab.  
The list of care team roles that displays on this page refreshes as roles are created, edited, or deleted on the **Care Team Roles** page.
4. From the **Actions** menu of the care team role, click **Reset to default**.  
The **Reset to Default** page opens.
5. Click **Save** to confirm your action.

## Configuring family summary cards

View and maintain the library of cards that display by default on the **Family Summary** page. The default family summary cards are: **Team**, **Latest Note**, and **Latest Touchpoint**.

Access the family summary cards to verify that the number of records that are displayed is correct. You can also reorder the sequence in which cards are displayed.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Select **Families > Families**, and select **Family Summary Cards**.  
By default, the number of records that are shown is five and the display value is set to **Shown**.
3. Manage the display of an outcome by completing the following steps in the **Actions**  menu of the outcome:
  - Select **Edit** to modify the number of records shown.



### Note:

The Edit function is disabled if the **Records Shown** field is set to **Not applicable**.

- Select **Show** to make a card available for the care team to use.
  - Select **Hide** to make a card unavailable.
4. Select **Reorder** to reorder the sequence of cards. Then, select the  icon of the card that you want to reorder and drag it to a new location on the **Reorder Family Summary Cards** page.

## Configuring client identification types

Care teams can capture different types of identification for clients, for example, their Employee ID, Passport Number, or Insurance Number. You can create a library of identification types for your organization and edit the name of an identification type after you create it. You can also configure whether an identification type is made available to care teams to use, or hidden from view.

### Creating identification types

You can configure an identification type to make it available for use by care teams.

You can associate an external system reference with the identification type record that you are creating. When sending an identification type as an API attribute, the external system identifies the identification type by its external system reference. You can configure only one preferred identification type.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data > Identification Types**.

Existing identification types are displayed. The **State** indicates whether identification types that are configured in the application are available to the care team to use. The **External System Reference** displays the reference that the external system uses to identify the identification type. **Preferred Identification** indicates whether the identification type is the preferred identification type to display throughout the application for all clients, for example, in the client context pane and downloaded PDFs.

3. Click **New**.

The **New Identification Type** page opens.

4. Name the type of identification.

5. In the External System Reference field, enter a unique reference number of up to 20 alphanumeric characters.

6. You can indicate whether this is the preferred identification type to display for all clients. Care teams can override this configuration for individual clients in the Care Team workspace if needed.

7. Click **Save**.

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## Related information

[Configuring external system references \(on page 241\)](#)

## Modifying identification types

You can update an identification type in the library of configured identification types.

You can reorder the sequence in which types are displayed. You can also show an identification type to make it available for use by care teams, or hide an identification type to make it unavailable. Your changes are applied immediately throughout the application.

You can rename an identification type and if not previously configured, you can associate a new external system reference with the identification type record. When sending an identification type as an API attribute, the external system identifies the identification type by its external system reference. If you update an existing external system reference that was previously configured and is already in use in existing integrations, you might cause existing integrations to fail.

In addition, if you modify an external system reference that is associated with an identification type, you cannot reuse the old external system reference when configuring other identification types. You can configure only one preferred identification type.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data > Identification Types**.

Existing identification types are displayed. The **State** indicates whether identification types that are configured in the application are available to the care team to use. The **External System Reference** displays the reference that the external system uses to identify the identification type. **Preferred Identification** indicates whether the identification type is the preferred identification type to display throughout the application for all clients, for example, in the client context pane and downloaded PDFs.

3. From the **Actions** menu of an identification type, modify the type by completing the following steps:

- - a. Rename the identification type.
  - b. In the External System Reference field, enter a unique reference number of up to 20 alphanumeric characters.
  - c. You can indicate whether this is the preferred identification type to display for all clients. Care teams can override this configuration for individual clients in the Care Team workspace if needed.

- d. Click **Save**. After you save the identification type, the name is applied to all existing client records where that identification type is captured.
  - e. Select **Show** or **Hide** to show or hide the identification type to the care team. The **Show** or **Hide** action is available only when the identification type is hidden or shown respectively.
4. To reorder the sequence of identification types, click **Reorder**. Drag and drop the identification types to position them in your preferred order.

## Configuring client relationship types

Care teams can capture relationship information a client and those individuals that the client has a relationship with, for example if client is a roommate or a parent of the client. The relationships that you enter must be gender neutral. For example, Parent - Child, rather than Father - Son. You can add relationships to the library to suit the needs of your organization, and you can reorder the list of relationships that the care team will see. You can configure whether a relationship type is made available to care teams to use, or hidden from view. You can add and edit a relationship, and associate an external system reference with the relationship record.

### Creating relationships

You can configure a relationship to make it available for use by care teams.

The relationships that you enter must be gender neutral. For example, Parent - Child, rather than Father - Son. The values for Relationship to client and Reciprocal Relationship can be the same. For example, Spouse - Spouse or Classmate - Classmate. By default, each new relationship is made available to the team to select. You can associate an alphanumeric external system reference with the relationship record that you are creating. When sending a relationship as an API attribute, the external system identifies the relationship by its external system reference. The Relationship to client and Reciprocal Relationship attributes share the same external system reference.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data > Relationships**.

Existing relationships are displayed. The **External System Reference** displays the reference that the external system uses to identify the relationship.

3. Click **New**.

The **New Relationship** page opens.

4. Name the relationship to client.

5. Name the reciprocal relationship.

6. In the External System Reference field, enter a unique reference number of up to 20 alphanumeric characters.
7. Click **Save**.

## Modifying relationships

You can update a relationship in the library of configured relationships.

You can reorder the sequence in which relationships are displayed. You can also show a relationship to make it available for use by care teams, or hide a relationship to make it unavailable. Your changes are applied immediately throughout the application.

The relationships that you enter must be gender neutral. For example, Parent - Child, rather than Father - Son. By default, each new relationship is made available to the team to select. You can rename a relationship and if not previously configured, you can associate a new external system reference with the relationship record.

When sending a relationship as an API attribute, the external system identifies the relationship by its external system reference. If you update an existing external system reference that was previously configured and is already in use in existing integrations, you might cause existing integrations to fail.

In addition, if you modify an external system reference that is associated with a relationship, you cannot reuse the old external system reference when configuring other relationships.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data > Relationships**.

Existing relationships are displayed. The **External System Reference** displays the reference that the external system uses to identify the relationship.

3. From the **Actions** menu of a relationship, modify the relationship by completing the following steps:

- - a. Rename the Relationship to client.
  - b. Rename the Reciprocal Relationship.
  - c. In the System Reference field, enter a unique reference number of up to 20 alphanumeric characters.

- d. Click **Save**. After you save the relationship, the name is applied to all existing client records where that relationship is captured.
  - e. Select **Show** or **Hide** to show or hide the relationship to the care team. The **Show** or **Hide** action is available only when the relationship is hidden or shown respectively.
4. To reorder the sequence of relationships, click **Reorder**. Drag and drop the relationships to position them in your preferred order.

## Configuring client tags

Manage the types of tags that your organization captures for clients. Tags can be used to record information about a client that is important to your organization, for example if a client is a member of an organization or group. If configured to be shown, you should select the source of the tag information and optionally, the name of the original source system where the tag information originated. You can reorder the list of tags that the care team will see. You can also configure whether a client tag is made available to the care team to use or is hidden from view.

### Creating client tags

You can configure a client tag to make it available for use by care teams.

Tags can be used to record information about a client that is important to your organization, for example if a client is a member of an organization or group.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data > Tags**.  
Existing client tags are displayed. The **Display state** indicates whether client tags that are configured in the application are available to the care team to use.
3. Click **New**.  
The **New Client Tag** page opens.
4. Name the client tag.
5. Click **Save**.

### Modifying client tags

You can update a client tag in the library of configured client tags.

You can reorder the sequence in which client tags are displayed. You can rename a client tag. You can also show a client tag to make it available for use by care teams, or hide a client tag to make it unavailable. Your changes are applied immediately throughout the application.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data > Tags**.  
Existing client tags are displayed. The **Display state** indicates whether client tags that are configured in the application are available to the care team to use.
3. From the **Actions** menu of a client tag, modify the tag by completing the following steps:
  - a. Rename the client tag.
  - b. Click **Save**. After you save the client tag, the name is applied to all existing client records where that client tag is captured.
  - c. Select **Show** or **Hide** to show or hide the client tag to the care team. The **Show** or **Hide** action is available only when the client tag is hidden or shown respectively.
4. To reorder the sequence of client tags, click **Reorder**. Drag and drop the client to position them in your preferred order.

## Configuring client risks

You can configure a library of risks that can be created for clients. For example, the risk of readmission. Risks can be standard or specific to your organization. You can configure the library of risks and the overall range that a risk score must be in. You can configure categories for risk ranges, so that risk scores are assigned to an appropriate category when they are entered by the care team.

### Creating risks

You can create a library of risks for your organization. After you create a new risk, a draft version of the risk automatically opens for you to continue configuring the risk. Activate the draft version to make it available for use.

You can configure risks that are in a draft, or **In Edit**, state only. Only one **In Edit** version can exist.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data > Risks**.  
Existing risks are displayed.
3. Click **New**.  
The **New Risk** page opens.
4. Enter a unique name for the risk of up to 100 characters.
5. Enter a description for the risk of up to 2000 characters.
6. Click **Save** to add the risk to the library. An editable version of the risk automatically opens.
7. Continue configuring the risk by creating the risk range and categories.

## Creating risk ranges

Care teams enter scores for risks to indicate the probability that a risk will happen. You can create the overall range of values that the score must be in when care teams create the risk.



### Restriction:

A risk can have only one overall range. You can create a range for a draft risk only if the risk does not already have a range defined. Otherwise, create a new risk or you can delete the range of an existing **In Edit** risk and add a new range, if needed.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data > Risks**.  
Existing risks are displayed.
3. Expand a risk. The risk versions are displayed.
4. Click the effective from date of an **In Edit** version of a risk to open the in-edit version.
5. Click **New**.  
The **New Risk Range** page opens.
6. Enter the overall range for the risk score. Enter a minimum number and a maximum number for the range.
7. Click **Save**.

## Creating risk categories

Risk categories indicate where a risk score falls in the overall risk range. For example, high, medium, or low. Add categories to the risk range so that the score achieved by a client can be automatically assigned to the appropriate category if it falls within its range.

For each category, you must configure the range that the score must be in to be assigned to the category.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data > Risks**.  
Existing risks are displayed.
3. Expand a risk. The risk versions are displayed.
  - If an **In Edit** version exists, click the effective from date of the risk to open the in-edit version.
  - If no **In Edit** version exists:

- a. Click **New Version** in the risk **Actions** menu to create an in-edit version.
  - b. Click **Yes** to confirm that you want to create a new version of the risk. An editable version of the risk automatically opens.
4. Click **New Category** in the **Actions** menu for the risk range to open the **New Category** page.
  5. Enter a unique name for the category of up to 64 characters.
  6. Enter the range that the risk score must be in to be assigned to the category. Enter a minimum number and a maximum number for the range.

**Tip:**

Ensure that the range is within the overall risk range and there are no gaps between the category ranges and the risk range.

7. Click **Save**.

## Activating risks

Activate draft risk versions to ensure they are complete and to make them available for use in the application. Validate the risk and correct any issues before you activate it. Activated risks are automatically made available to care teams to create.

You can validate and activate a risk from either the **Risks** list or the home page of a risk.

A risk is complete when there are no gaps in the ranges that are specified for its categories, if configured, and the ranges are within the overall risk range. The category ranges must be consecutive and must not overlap with the ranges of any existing categories.

**Tip:**

Correct any issues with your category ranges. Otherwise, care teams can still create the risk but the risk displays a message stating that no category is defined.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data > Risks**.  
Existing risks are displayed.
  - To activate a risk from the **Risks** list, complete the following steps:
    - a. Expand a risk. The risk versions are displayed.
    - b. From the **Actions** menu of an **In Edit** version, select **Validate** to validate the risk before you activate it. The **Validate Risk** page opens.
    - c. Click **Validate**.

- d. To activate the risk, from the **Actions** menu of the **In Edit** version, select **Activate**. The **Activate Risk Version** page opens. By setting the Effective From date, you can specify a date when care teams can start to use the new version.
- e. Click **Activate** to activate the risk.
- To activate the risk from the risk home page, complete the following steps:
  - a. Expand a risk. The risk versions are displayed.
  - b. Click the effective from date of an **In Edit** version to open the risk.
  - c. From the **Actions** menu of the risk range, select **Validate Risk** to validate the risk before you activate it. The **Validate Risk** page opens.
  - d. Click **Validate** to validate the risk.
- e. To activate the risk, from the **Actions** menu of the risk range, select **Activate Risk**. The **Activate Risk Version** page opens. By setting the Effective From date, you can specify a date when care teams can start to use the new version.
- f. Click **Activate** to activate the risk.

## Modifying risks

You can edit the name and description of a risk, or create a new version of a risk to make further changes. A new version of a risk is always in the **In Edit**, or draft, state until you activate it. You can show and hide risks as needed to make them available for use by the care team.

When risks are shown, they are available for care teams to select when they create or edit risks. You can hide a risk that is not needed and it becomes unavailable for selection. Existing risks for clients are not affected.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data > Risks**.  
Existing risks are displayed.
3. To update the name and description of a risk, click **Edit** in the **Actions** menu of a risk.
  - a. Modify the name and description.
  - b. Click **Save**.
4. To create a new editable version of an existing risk, complete the following steps:
  - a. Click **New Version** in the **Actions** menu of an active risk.
  - b. Click **Yes** to confirm that you want to create a new version of the risk.
5. Modify the risk range and categories that are associated with the risk range, if configured.
6. To hide the risk, from the **Actions** menu of a risk, select **Hide**.
7. To show the risk, from the **Actions** menu of a risk, select **Show**.

## Modifying risk ranges

You can update the overall range of a risk. A risk score must fall within the overall range of values when care teams create the risk.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data > Risks**.  
Existing risks are displayed.
3. Expand a risk. The risk versions are displayed.
  - If an **In Edit** version exists, click the effective from date of the risk to open the in-edit version.
  - If no **In Edit** version exists:
    - a. Click **New Version** in the risk **Actions** menu to create an in-edit version.
    - b. Click **Yes** to confirm that you want to create a new version of the risk. An editable version of the risk automatically opens.
4. Click **Edit** in the **Actions** menu for the risk range to open **Edit Risk Range** page.
5. Update the range of the risk. Enter a minimum and a maximum number for the range.
6. Click **Save**.

## Modifying risk categories

You can rename a risk category and its range. When you activate the risk, your updates are immediately applied to new risks that are created for clients by care teams.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data > Risks**.  
Existing risks are displayed.
3. Expand a risk. The risk versions are displayed.
  - If an **In Edit** version exists, click the effective from date of the risk to open the in-edit version.
  - If no **In Edit** version exists:
    - a. Click **New Version** in the risk **Actions** menu to create an in-edit version.
    - b. Click **Yes** to confirm that you want to create a new version of the risk. An editable version of the risk automatically opens.
4. Click **Edit** in the **Actions** menu of any row in the **Category** section to open the **Edit Category** page.
5. Rename the category or update its range. Enter a minimum number and a maximum number to update the range.



**Tip:**

Ensure that the updated range is within the overall risk range and there are no gaps between the category ranges and the risk range.

6. Click **Save**.

## Deleting risks

You can delete an in-edit version of a risk but not the active version.

Existing risks for clients are not affected when you delete them. The care team can continue to work with these risks. Deleted risks are unavailable for selection when the care team create a new risk.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data > Risks**.  
Existing risks are displayed.
3. Expand the risk to see the versions, and click **Delete** in the Actions menu of an in-edit version.
4. Click **Yes** to confirm that you want to delete the risk version.

## Deleting risk ranges

You can delete the risk range from an in-edit version of a risk but not from an active version.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data > Risks**.  
Existing risks are displayed.
3. Expand a risk. The risk versions are displayed.
  - If an **In Edit** version exists, click the effective from date of the risk to open the in-edit version.
  - If no **In Edit** version exists:
    - a. Click **New Version** in the risk **Actions** menu to create an in-edit version.
    - b. Click **Yes** to confirm that you want to create a new version of the risk. An editable version of the risk automatically opens.
4. Click **Delete** in the **Actions** menu for the risk range to open **Delete Risk Range** page.
5. Click **Yes** to confirm that you want to delete the risk range.

## Deleting risk categories

If a risk category is obsolete or not required, you can delete it from the risk range. You can delete a risk category from an in-edit version of a risk but not from an active version.

Existing categories that are already in use in the application are not affected when you delete them. The care team can continue to work with any risks with these categories. However, scores for new risks are not assigned to the category.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data > Risks**.  
Existing risks are displayed.
3. Expand a risk. The risk versions are displayed.
  - If an **In Edit** version exists, click the effective from date of the risk to open the in-edit version.
  - If no **In Edit** version exists:
    - a. Click **New Version** in the risk **Actions** menu to create an in-edit version.
    - b. Click **Yes** to confirm that you want to create a new version of the risk. An editable version of the risk automatically opens.
4. Expand the risk range.
5. Click **Delete** in the **Actions** menu of any row in the **Category** section to open the **Delete Category** page.
6. Click **Yes** to confirm that you want to delete the risk category.

## Configuring client deactivation reasons

When a care team member or supervisor deactivates a client in Watson™ Care Manager, a reason must be recorded. You can configure and manage a library of reasons that indicate why a client is deactivated in the application.

### Adding client deactivation reasons

If a suitable client deactivation reason does not exist in the library of configured reasons that come with the product, you can add a new reason. The reasons that you configure become available to the care team and supervisors to select when they deactivate a client.

The deactivation reasons that are available by default are as follows: Deceased, Duplicate, Graduated/Completed, Ineligible, Non Responder, Opt Out, Referral Rejected, Other, and Duplicate Registration.

Watson™ Care Manager automatically associates the Duplicate Registration deactivation reason with

clients who are deactivated automatically when a duplicate registration is resolved by a care team member. By default, the Duplicate Registration reason is hidden from view and cannot be shown.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **General > Client Deactivation Reasons**.

The Client Deletion Reasons library opens. The **Display** state indicates whether configured reasons are currently Shown and available to the care team to use, or Hidden and unavailable.

3. To add a new deactivation reason, click **New**. The **New Deactivation Reason** page opens.
4. Enter a unique reason that does not duplicate any existing deactivation reason in the library. Click **Save** to add the deactivation reason to the library. The Client Deactivation Reasons list refreshes.
5. Use the **Show** and **Hide** actions to display the reason to users or hide it from view.

- To hide the reason, from the Actions menu, select **Hide**.

- To show the reason, from the Actions menu, select **Show**.

You cannot show or hide the **Other** reason so that a user can always enter a reason in the Other field.

6. To reorder the sequence of client deactivation reasons, click **Reorder**. Drag and drop the reasons to position them in your preferred order.

## Modifying client deactivation reasons

You can update a client deactivation reason. When you change a client deactivation reason in the library of configured reasons, all existing instances in client records are updated

The default deactivation reasons that are come with the product cannot be edited: Deceased, Duplicate, Graduated/Completed, Ineligible, Non Responder, Opt Out, Referral Rejected, Other, and Duplicate Registration. Watson™ Care Manager automatically associates the Duplicate Registration deactivation reason with clients who are deactivated automatically when a duplicate registration is resolved by a care team member. By default, the Duplicate Registration reason is hidden from view and cannot be shown.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **General > Client Deactivation Reasons**.

The Client Deactivation Reasons library opens. The **Display** state indicates whether configured reasons are currently Shown and available to the care team to use, or Hidden and unavailable.

3. To modify an existing client deactivation reason, from the row-level actions menu, click **Edit**. The **Edit Deactivation Reason** page opens.

4. Update the deactivation reason. Ensure the updated reason is a unique reason that does not duplicate any existing client deactivation reason in the library. Click **Save**. The Client Deactivation Reasons list refreshes.
5. Use the **Show** and **Hide** actions to display the reason to the care team or hide it from view.
  - To hide the reason, from the Actions menu, select **Hide**.
  - To show the reason, from the Actions menu, select **Show**.You cannot show or hide the **Other** reason so that a user can always enter a reason in the Other field.
6. To reorder the sequence of client deactivation reasons, click **Reorder**. Drag and drop the reasons to position them in your preferred order.

When you update a reason for a client deactivation, any existing instances of the deactivation reason are updated in the application. If the client's deactivation is later reversed, the original reason for the deactivation is updated in the client's history to capture the reversal reason.

## Configuring client referral reasons

When a care team member or supervisor refers a client in Watson™ Care Manager, a reason must be recorded. You can configure and manage a library of reasons that indicate why a client is referred in the application.

### Adding client referral reasons

If a suitable client referral reason does not exist in the library of configured reasons, you can add a new reason. The reasons that you configure become available to the care team to select when they refer a client. You can add an external system reference so Watson™ Care Manager can identify the referral reason by its external system reference when it receives a referral.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **General > Client Referral Reasons**.

The **Client Referral Reasons** library opens. The Display state indicates whether configured reasons are currently **Shown** and available to the care team to use, or **Hidden** and unavailable.

3. To add a new referral reason, click **New**. The **New Referral Reasons** page opens.
4. Enter a unique reason that does not duplicate any existing client referral reason in the library. Optionally, enter an alphanumeric external system reference to a maximum of 20 characters. Click **Save** to add the referral reason to the library. The Referral Reasons list refreshes.
5. Use the **Show** and **Hide** actions to display the reason to the care team or hide it from view.

You cannot show or hide the Other reason so that a user can always enter a reason in the Other field.

- To hide the reason, from the Actions menu, select **Hide**.
  - To show the reason, from the Actions menu, select **Show**.
6. To reorder the sequence of referral reasons, click **Reorder**. Drag and drop the reasons to position them in your preferred order.

## Modifying client referral reasons

You can update a client referral reason. When you change a client referral reason in the library of configured reasons, all existing instances in client records are updated. You can add an external system reference so Watson™ Care Manager can identify the referral reason by its external system reference when it receives a referral.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **General > Client Referral Reasons**.  
The **Client Referral Reasons** library opens.
3. To modify an existing client referral reason, click **Edit**. The **Edit Referral Reason** page opens.
4. Update the referral reason. Ensure that the updated reason is a unique reason that does not duplicate any existing client referral reason in the library. Optionally, enter an alphanumeric external system reference to a maximum of 20 characters. Click **Save** to add the referral reason to the library. The Referral Reasons list refreshes.
5. Use the **Show** and **Hide** actions to display the reason to the care team or hide it from view.

You cannot show or hide the **Other** reason so that a user can always enter a reason in the **Other** field.

- To hide the reason, from the Actions menu, select **Hide**.
  - To show the reason, from the Actions menu, select **Show**.
6. To reorder the sequence of referral reasons, click **Reorder**. Drag and drop the reasons to position them in your preferred order.

## Configuring referral lists

Manage and configure the columns that are displayed on the referral list pages in the Supervisor and Care Team workspaces. You can configure the display columns for the Open Unassigned Referrals, My Open Referrals, and Open Assigned Referrals list pages.

You can configure all available values for display except Name and Referred On which are mandatory. Including Name and Referred On, you can configure a maximum of 6 values to display as columns on the list pages or in the expanded view.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **General > Referrals > Referrals Lists**.

The **Client Referral Lists** library opens. The Display state indicates whether a value is currently **Shown as a column** or **Shown in expanded view** and available to the care team to use, or **Hidden** and unavailable.

3. From the Actions menu, select **Show as column** to display the value as a column header to the care team.

The referral list pages are updated in the Care Team and Supervisor workspaces.

4. From the Actions menu, select **Show in expanded view** to display the value in an expanded view to the care team at run time.

The referral list pages are updated in the Care Team and Supervisor workspaces.

5. From the Actions menu, select **Hide** to hide the value from the care team.

The referral list pages are updated in the Care Team and Supervisor workspaces.

## Configuring client deletion reasons

When a team member deletes a client from Watson™ Care Manager or when a supervisor undoes the deletion of a client, a reason must be recorded. You can configure and manage a library of reasons for why a client was deleted or why the deletion was reversed.

### Adding client deletion reasons

If a suitable client deletion reason does not exist in the library of configured reasons, you can add a new reason. The reasons that you configure become available to the care team to select when they delete a client.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Client Data > Client Deletion Reasons**.

The tabs in the Client Deletion Reasons library contain a list of reasons for deleting or undoing the deletion of a client.

3. To add a new client deletion reason, from the **Deletion Reasons** tab, click **New**. The **New Deletion Reason** page opens.

4. Enter a unique reason that does not duplicate any existing delete client reason in the library. Click **Save** to add the delete reason to the library. The Client Deletion Reasons list opens.
5. Use the **Show** and **Hide** actions to display the reason to the care team or hide it from view.
  - To hide the reason, from the Actions menu, select **Hide**.
  - To show the reason, from the Actions menu, select **Show**.
6. To reorder the sequence of delete client reasons, click **Reorder**. Drag and drop the reasons to position them in your preferred order.

## Modifying client deletion reasons

You can update a client deletion reason. When you change a client deletion reason in the library of configured reasons, all existing instances in client records are updated

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data > Client Deletion Reasons**.  
The tabs in the Client Deletion Reasons library contain a list of reasons for deleting or undoing the deletion of a client.
3. To modify an existing client deletion reason, from the **Deletion Reasons** tab, click **New**. The **Edit Deletion Reason** page opens.
4. Update the deletion reason. Ensure the updated reason is a unique reason that does not duplicate any existing delete client reason in the library. Click **Save** to add the delete reason to the library. The Delete Client Reasons list opens.
5. Use the **Show** and **Hide** actions to display the reason to the care team or hide it from view.
  - To hide the reason, from the Actions menu, select **Hide**.
  - To show the reason, from the Actions menu, select **Show**.
6. To reorder the sequence of delete client reasons, click **Reorder**. Drag and drop the reasons to position them in your preferred order.

## Adding undo client deletion reasons

If a suitable undo client deletion reason does not exist in the library of configured reasons, you can add a new reason. The reasons that you configure become available to supervisors to select when they undo the deletion of a client.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data > Client Deletion Reasons**.

The tabs in the Client Deletion Reasons library contain a list of reasons for deleting or undoing the deletion of a client.

3. To add a new client deletion reason, from the **Undo Deletion Reasons** tab, click **New**. The **New Undo Deletion Reason** page opens.
4. Enter a unique reason that does not duplicate any existing undo client deletion reason in the library. Click **Save** to add the delete reason to the library. The Undo Client Deletion Reasons list opens.
5. Use the **Show** and **Hide** actions to display the reason to the care team or hide it from view.
  - To hide the reason, from the Actions menu, select **Hide**.
  - To show the reason, from the Actions menu, select **Show**.
6. To reorder the sequence of delete client reasons, click **Reorder**. Drag and drop the reasons to position them in your preferred order.

## Modifying undo client deletion reasons

You can update an undo client deletion reason. When you change a reason in the library of configured reasons, all existing instances in client records are updated.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Client Data > Client Deletion Reasons**.  
The tabs in the Client Deletion Reasons library contain a list of reasons for deleting or undoing the deletion of a client.
3. To modify an existing undo client deletion reason, from the **Undo Deletion Reasons** tab, click **New**. The **Edit Undo Deletion Reason** page opens.
4. Update the reason. Ensure the updated reason is a unique reason that does not duplicate any existing reason in the library. Click **Save** to add the undo client delete reason to the library.
5. Use the **Show** and **Hide** actions to display the reason to the care team or hide it from view.
  - To hide the reason, from the Actions menu, select **Hide**.
  - To show the reason, from the Actions menu, select **Show**.
6. To reorder the sequence of reasons, click **Reorder**. Drag and drop the reasons to position them in your preferred order.

## Configuring for organizations

You can configure the titles and suffixes that apply to your organization's clients and care team members. You can configure organization names to display in reports and the languages that are available for selection in your organization.

## Configuring titles and suffixes for clients and care team members

To address someone correctly, you can create a library of titles or suffixes to add before or after their name. A client or care team member can be associated with a single title and one or more suffixes.

### Creating titles

A title is a prefix to someone's name that might be required to address the person correctly. You can create titles to associate with care team members or clients.

The following titles are provided in the application by default: Dr., Miss, Mr., Mrs., Ms., and Prof. You can add more titles to the library to suit the needs of your organization.

You can associate an external system reference with the title record that you are creating. When sending an alert as an API attribute, the external system identifies the title by its external system reference.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Organization > Titles**.  
The **Titles** page opens.
3. Click **New**.  
The **New Title** page opens.
4. In the **Title** field, enter a unique title to a maximum of 100 characters.
5. In the External System Reference field, enter a unique reference number of up to 20 alphanumeric characters.
6. Click **Save**.  
The Titles page lists the new title.

---

#### Related information

[Configuring external system references \(on page 241\)](#)

### Creating suffixes

A *suffix* is appended to someone's name to reflect the person's position, educational degree, accreditation, office, or honor. You can create suffixes to associate with care team members or clients.

The following suffixes are provided in the application by default: Esquire, Junior, Senior, First, Second, Third, Fourth, Fifth. You can add more suffixes to the library to suit the needs of your organization.

You can associate an external system reference with the suffix record that you are creating. When sending a suffix as an API attribute, the external system identifies the suffix by its external system reference.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Organization > Suffixes**.  
The **Suffixes** page opens.
3. Click **New**.  
The **New Suffix** page opens.
4. In the **Suffix** field, enter a unique suffix to a maximum of 100 characters.  
For example, M.D. might follow a doctor's name.
5. In the External System Reference field, enter a unique reference number of up to 20 alphanumeric characters.
6. Click **Save**.  
The Suffixes page lists the new suffix.

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#### Related information

[Configuring external system references \(on page 241\)](#)

## Updating titles and title display

To maintain relevant titles, you can edit any existing title in the library of titles. You can configure the library to show or hide specific titles. You can reorder titles so that the most relevant titles display first according to your organization's needs.

You cannot edit the following titles that are provided in the application by default: Dr., Miss, Mr., Mrs., Ms., and Prof.

You can update a title and if not previously configured, you can associate a new external system reference with the title record. When sending a title as an API attribute, the external system identifies the title by its external system reference. If you update an existing external system reference that was previously configured and is already in use in existing integrations, you might cause existing integrations to fail.

In addition, if you modify an external system reference that is associated with a title, you cannot reuse the old external system reference when configuring other titles.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Organization > Titles**.  
The **Titles** page opens.
3. To update an existing title, from the Actions menu, select **Edit** and enter a unique title.

4. In the External System Reference field, enter a unique reference number of up to 20 alphanumeric characters.
5. Click **Save**.
6. Use the **Show** and **Hide** actions to display a title to the care team or hide one from view. By default, newly-created titles are configured to be shown.
  - To show the title, from the Actions menu, select **Show**.
  - To hide the title, from the Actions menu, select **Hide**.
7. To reorder the sequence of titles, click **Reorder**.

The **Reorder Titles** page opens. Drag and drop the titles to position them in your preferred order, and click **Save**.

## Updating suffixes and suffix display

To maintain relevant suffixes, you can edit any existing suffix in the library of suffixes. You can configure the library to show or hide specific suffixes. You can reorder suffixes so that the most relevant suffixes display first according to your organization's needs.

You cannot edit the following suffixes that are provided in the application by default: Esquire, Junior, Senior, First, Second, Third, Fourth, Fifth.

You can update a suffix and if not previously configured, you can associate a new external system reference with the suffix record. When sending a suffix as an API attribute, the external system identifies the suffix by its external system reference. If you update an existing external system reference that was previously configured and is already in use in existing integrations, you might cause existing integrations to fail.

In addition, if you modify an external system reference that is associated with a suffix, you cannot reuse the old external system reference when configuring other suffixes.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Organization > Suffixes**.  
The **Suffixes** page opens.
3. To update an existing suffix, from the Actions menu, select **Edit** and enter a unique suffix.
4. In the External System Reference field, enter a unique reference number of up to 20 alphanumeric characters.
5. Click **Save**.
6. Use the **Show** and **Hide** actions to display a suffix to the care team or hide one from view. By default, newly-created suffixes are configured to be shown.

- To show the suffix, from the Actions menu, select **Show**.
  - To hide the suffix, from the Actions menu, select **Hide**.
7. To reorder the sequence of suffixes, click **Reorder**.
- The **Reorder Suffixes** page opens. Drag and drop the suffixes to position them in your preferred order, and click **Save**.

## Configuring the display format of a client's name

You can configure the display format for client names that determines how Watson Care Manager users will see client names displayed in the application.

The default display format on list pages and in client search pages is: Last Name, First Name. You can change the display format if you prefer to reflect a First Name Last Name display. The display format applies to list pages and Client Name filters in search pages but does not apply to all places in the application where a client's name is displayed.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **General > Client Name Display Format**.  
The **Client Name Display Format** page opens.
3. To change the default display format from **Last Name, First Name**, click **Edit** and select **First Name Last Name** to update the display format.

## Configuring organization names

You can configure the name of your organization, which is published in organizational reports, for example, a client's share care plan. You can specify a display name for the organization that differs from the organization name.

If you change a configured organization name or display name, the updated name is displayed in reports that are generated by care team members after you complete your update.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Organization > Organization**.  
The **Organization Name** page opens.
3. To add, update, or delete an organization name, click **Edit Name** and enter, update, or remove the name and associated display name.

## Configuring a Connect Providers support contact

If your organization has licensed the IBM Watson® Care Manager Connect Providers add-on component, you can configure the Connect Providers support contact details for your organization. The support details are shown in emails to service provider organizations, directing providers to where they can get help with the application.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Organization > Organization**.  
The **Organization Name** page opens.
3. To add, update, or delete a Configuring a Connect Providers support contact support contact, click **Edit Connect Providers Support Contact** and enter, update, or remove the contact details.

## Configuring a Connect Individuals support contact

If your organization has licensed the IBM Watson® Care Manager Connect Individuals add-on component, you can configure the Connect Individuals support contact details for your organization. The support details are shown in emails to clients, directing them to where they can get help with the application.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Organization > Organization**.  
The **Organization Name** page opens.
3. To add, update, or delete a Configuring a Connect Individuals support contact support contact, click **Edit Connect Individuals Support Contact** and enter, update, or remove the contact details.

## Configuring languages for organizations

Configure the languages that are available from the language selection menus for your organization. You can select from these languages when you create a contact preference. If providers are enabled, you can select from these languages when you configure a provider service. You can edit, show, or hide the languages, and set their order in the menu.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Select **Client Data > Languages** from the **Side Navigation menu**.  
The existing languages are displayed.
3. Click **New** to create a new language option, enter a language name and click **Save**.  
By default, new languages are shown in the menu.

4. Select **Show** or **Hide** from the **Actions** menu of a language to make it available or unavailable in the menu.
5. Select **Reorder** to reorder the languages in the menu, and click **Reorder**.
6. Select **Edit** from the **Actions** menu of a language, rename the language and click **Save**.

---

#### Related information

[Registering providers and services \(on page 104\)](#)

## Configuring organization units

Assuming that organization units are enabled for your organization, you can configure organization units to create organization structure and to assign users and clients to different parts of the organization. A care team can direct client referrals to the correct organization unit to meet their needs, and manage organizational workflow such as tasks and care team actions.



#### Important:

New implementations of Watson™ Care Manager that are using organizational units should ensure that all users are associated with a organizational unit before they use the application.



#### Note:

The care team groups feature that allows you to predefine groups of care team members is not currently supported for use with organization units.

## Creating organization units

You can add an organization unit to the library of organization units in the application. You can register the contact and address details of the new organization unit.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Organization > Organization Units**.  
The **Organization Units** page opens.
3. Click **New**.  
The **New Organization Unit** page opens.
4. In the **Details** section, provide details to identify and contact the organization unit.
  - **Name**- Enter a unique name for the organization unit to a maximum of 200 characters.
  - **External System Reference**- Enter the reference number or code that the organization unit is assigned by the organization to uniquely identify it.

- **Display Name**- Enter the display name for the organization unit, which can be included in organizational reports, for example, a client's share care plan.
  - **Area Code**- If you enter an area code, enter a phone number.
  - **Phone**
5. In the **Address** section, enter the address of the organization unit.
6. Click **Save**.

The **Organization Units** page lists the new organization unit.

## Modifying organization units

You can edit any existing organization unit in the library to maintain the latest contact and address details.

1. Sign in with your administrator credentials.

Your home page opens.
2. From the **Side Navigation menu**, select **Organization > Organization Units**.

The **Organization Units** page opens.
3. Click the **Name** hyperlink of the organization unit that you want to edit.

The home page of the selected organization unit opens.
4. Click **Edit**.

The **Edit Organization Unit** home page opens.
5. In the **Details** section, update details to identify and contact the organization unit.
  - **Name**- Enter a unique name for the organization unit to a maximum of 200 characters.
  - **External System Reference**- Enter the reference number or code that the organization unit is assigned by the organization to uniquely identify it.
  - **Display Name**- Enter the display name for the organization unit, which can be included in organizational reports, for example, a client's share care plan.
  - **Area Code**- If you enter an area code, enter a phone number.
  - **Phone**
6. In the **Address** section, update the address of the organization unit.
7. Click **Save**.

The **Organization Units** page lists the updated organization unit.

## Adding users to organization units

You can add users to an organization unit to manage clients, referrals, and workflow for that organization unit such as tasks and care team actions. However, note that a user can only belong to one organization unit and cannot be removed after you add them.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Side Navigation menu**, select **Organization > Organization Units**.  
The **Organization Units** page opens.
3. Click the **Name** hyperlink of the organization unit that you want to edit.  
The home page of the selected organization unit opens.
4. Select the **Users** tab to see a list of users who currently belong to the organization unit.
5. Click **Add**.  
The **Add User** page opens.
6. Search for and select one or more listed users to add to the organization unit.  
Only active users who are not already associated with an organization unit are listed and available for selection. The user's Login ID can help you to differentiate between users with the same name, and you can further identify users by their assigned workspaces.
7. Click **Add**.  
The **Users** page lists the user or users that you added.

## Configuring client messaging

The client messaging functionality enables clients and their care teams to send and receive messages about the client's care through IBM Watson® Care Manager.

You can enable client messaging in the care team application through the following features:

- **Messaging**

To use the messaging feature, your organization must use the IBM Watson® Care Manager Connect Individuals application, which resides in IBM Watson® Care Manager. You can show or hide the messaging feature in the Connect Individuals and care team applications.

- **External messaging**

The external messaging feature uses the external messaging API to facilitate messaging between care teams and clients, and does not require the use of the Connect Individuals application. You can show or hide the external messaging feature in the care team application.

-  **Note:**

You can either show the messaging feature or the external messaging feature in the care team application, but not both.

## Enabling the messaging feature

You can show or hide all pages, actions, buttons, fields, and columns that relate to the messaging feature in the care team and Connect Individuals applications.

The messaging feature resides in IBM Watson® Care Manager and IBM Watson® Care Manager Connect Individuals and is not an add-on component.

You can show the messaging feature whenever it is suitable for your organization. For example, you might choose to show the messaging feature only if care teams in your organization have capacity to respond to messages from their clients. If care teams do not have capacity to respond to messages, you can hide messaging. When the messaging feature is hidden, care teams and clients can no longer access, send, or receive messages in the care team and Connect Individuals applications.



### Note:

If you want to show the messaging feature, you must first hide the external messaging feature if the external messaging feature was previously configured to show in the care team application.

For more information, see [Enabling the external messaging feature \(on page 238\)](#).

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Plan**.

The **Plan** page opens.

3. To show or hide the messaging feature, choose one of the following options, as applicable.

- From the **Actions** menu of the Messaging plan setting, select **Show**.
- From the **Actions** menu of the Messaging plan setting, select **Hide**.

## Enabling the external messaging feature

You can show or hide all pages, actions, buttons, fields, and columns that relate to the external messaging feature in the care team application.

The external messaging feature uses the external messaging API to facilitate messaging between the care team and the client's external portal. To use the external messaging feature, you must enable the external messaging API. For more information, see [External Messaging API \(on page 451\)](#).

The external messaging feature does not require the use of the Connect Individuals application, and can be enabled for any organization whether they use the Connect Individuals application or not.

You can show the external messaging feature in the care team application whenever it is suitable for your organization. For example, you might choose to show the external messaging feature only if care teams in your organization have capacity to respond to messages from their clients. If care teams do not have capacity to respond to messages, you can hide external messaging. When the external messaging feature is hidden, care teams and clients can no longer access, send, or receive messages in the care team application.

**Note:**

If you want to show the external messaging feature, you must first hide the messaging feature if the messaging feature was previously configured to show in the care team application. For more information, see [Enabling the messaging feature \(on page 238\)](#).

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Plan**.  
The **Plan** page opens.
3. To show or hide the external messaging feature, choose one of the following options, as applicable.
  - From the **Actions** menu of the External Messaging plan setting, select **Show**.
  - From the **Actions** menu of the External Messaging plan setting, select **Hide**.

## Configuring external roles for integrated systems

For a user to view client information in Watson™ Care Manager that is recorded on an external system, an external role can be preconfigured and associated with a user. The configuration is necessary for security reasons in the external system to determine the data that an external role is permitted to view when accessing a client's information.

This configuration is available only for Watson™ Care Manager integrations with external systems. If the external role feature is not already enabled for your organization, you must submit a case on the [Watson Health Support Portal](#) to request this configuration.

Manage a configurable list of external roles to associate with users in the library. You can create or update an external role to associate with users. You can delete an external role if it is no longer needed.

## Creating external roles for data access

You can add an external role to share with external systems when users access client information recorded in those systems from Watson™ Care Manager. The external system identifies the user by their external role.

By adding an external role, users with the role can access only client information relevant to that role in the external system. Typically, the **External Role** field attribute indicates an organization name and a role in that organization in this format: <AgencyName>|<Role> (200 maximum characters). Each value is separated by a bar '|'.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Quick Links** page or the side navigation menu, click **External Roles**.  
The **External Roles** page opens.
3. Click **New**.  
The **New External Role** page opens.
4. In the **External Role** field, enter a unique value in the format <text> | <text>.   
For example, an external role might consist of an organization name and role, such as 'Midway Health Center | Care Management'.
5. Click **Save**.  
The **External Roles** page lists the new external role.

## Modifying external roles for data access

You can update an external role so that users with the role can access only client information relevant to that role in an external system. The external system identifies the user by their external role.

Typically, the **External Role** field attribute indicates an organization name and a role in that organization in this format: <AgencyName>|<Role> (200 maximum characters). Each value is separated by a bar '|'.

1. Sign in with your administrator credentials.  
Your home page opens.
2. From the **Quick Links** page or the side navigation menu, click **External Roles**.  
The **External Roles** page opens.
3. From the **Actions** menu of a listed external role, click **Edit**.  
The **Edit External Role** page opens.
4. In the **External Role** field, update the value to reflect a unique value in the format <text> | <text>.   
For example, an external role might consist of an organization name and role, such as 'Midway Health Center | Care Management'.

5. Click **Save**.

The **External Roles** page lists the updated external role.

## Deleting external roles

You can delete a configured external role to remove it from the library of roles.

1. Sign in with your administrator credentials.

Your home page opens.

2. From the **Quick Links** page or the side navigation menu, click **External Roles**.

The **External Roles** page opens.

3. From the **Actions** menu of a listed external role, click **Delete**.

The **Delete External Role** page opens.

4. Confirm that you want to delete the role by clicking **Delete**.

The **External Roles** page no longer lists the external role.

## Configuring external system references

An *External System Reference* is an alphanumeric code that uniquely identifies items sent and received between Watson™ Care Manager and an external system through an API. You can configure an external system reference for multiple items in the Administration application so that they can be matched with a configured value in Watson™ Care Manager.

For example, you might configure an action **Meal Plan Assistance** to have an External System Reference **CAMP1**. When action data is received from an external application for Laurie Thompson, in addition to the information that identifies Laurie and the action details, if the action data includes the External System Reference **CAMP1**, Watson™ Care Manager matches the action data to the configured **Meal Plan Assistance** action.

You can use the same external system reference to identify different items in administration. For example, you can associate the External System Reference **CAMP1** with an action and an alert. However, external system references must be unique when associated with more than one item of the same type, for example, multiple alerts.

You can configure external system references for the following items:

- Alerts
- Actions
- Assessments
- Care team roles

- Configurable client data
- Client referral reasons
- External referrals
- Identification types
- Notes
- Original source systems
- Programs
- Share care plan templates
- Sources
- Suffixes
- Titles

For more information on how to configure external system references, see the relevant configuration topic for each of the listed items. For example, [Creating actions \(on page 87\)](#).

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#### Related information

[External system reference identifiers \(on page 422\)](#)

## Reuse of external system references

If you modify an external system reference, for most items, you can subsequently reuse the original external system reference and associate it with another item. However, for security reasons, you cannot reuse an external system reference that was previously associated with an item that relates to clients' protected health information.

If you modify an external system reference that is associated with any of the following items, you can subsequently associate the original external system reference with another item, if required:

- Alerts
- Actions
- Assessments
- Care team roles
- Client referral reasons
- Configurable client data
- Notes
- Original source systems
- Programs
- Share care plan templates
- Sources

**Important:**

You cannot reuse any external system reference that was previously associated with an item that relates to the capture of clients' protected health information by the care team. Therefore, you cannot reuse external system references when configuring the following items:

- Identification types
- Titles
- Suffixes

For example, if you configure an identification type to have an External System Reference **ID1000** and you subsequently change it to **ID2000**, you cannot use **ID1000** again when configuring other identification types.

## Configuring Share Care Plan templates

You can configure a library of templates for the care team to choose when they generate Share Care Plans for clients. You can add an uploaded image or organization logo to the template to show that the Share Care Plan is from a particular organization. If configured, you can view active custom client data types in the Share Care Plan.

The subsequent activated version of a custom client data type is automatically added to the existing templates. The display value for this version is the same as the display value of the last added version. If the custom client data type name is more than 80 characters, the extra characters are truncated, and the effective date is appended.

If the effect version is available, it is also appended. If your organization chooses to delete active versions of client data types, then they do not display as a section in the share care plan. If a client data type is marked to be included in the share care plan, the versions of such a custom client data type is available in Configured Client Data Types drop down or template list page only when the version is activated.

You can't specify a separate order for configurable client data in the share care plan template. You can only reorder the other general sections of a share care plan template.

## Creating Share Care Plan templates

IBM Watson® Care Manager comes with a default Share Care Plan template that you cannot edit. You can add new report templates as needed, or you can copy an existing report template as a baseline for a new template. You can configure the library to show or hide specific report templates.

Care teams use report templates to generate Share Care Plan templates to download and share with others, or to share with external parties (via webhooks integration). If you hide a template that is used in existing integrations, you might cause existing integrations to fail.

You can associate an external system reference with the template that you are creating or copying. When sending a care plan template as an API attribute, the external system identifies the template by its name or by its external system reference.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Share the Care Plan**.

The **Templates** page opens.

3. Complete one of the following actions.

- Create a new template.
  - a. Click **New**. The **New Template** page opens.
  - b. Name the template to a maximum of 100 characters, and provide a description.
  - c. From the listed images, select an image to include in the template
  - d. In the **External System Reference** field, enter a unique reference number of up to 20 alphanumeric characters.
  - e. To include or exclude the content sections of the template, select or clear each checkbox. By default, all listed sections are selected.
  - f. Optionally, to include or exclude the configured client data types on the template, select or clear each checkbox. By default, all listed client data types are selected.
  - g. Click **Save**.
- Copy an existing template as the baseline for a new template.
  - a. From the Actions menu of a template, select **Copy**. The **Copy Template** page opens.
  - b. Rename the template to make it different from the copied template name.
  - c. If configured, you can give the template a new external system reference. Enter a unique reference number of up to 20 alphanumeric characters.
  - d. Any image or organizational logo that is used in the existing template is displayed. Select another image or organizational logo from the list of available images.
  - e. Click **Save**.

The Templates page includes the new template.

4. Use the **Show** and **Hide** actions to display the template to the care team or hide it from view. By default, newly created templates are configured to be hidden.

- To show the template, from the Actions menu, select **Show**.
- To hide the template, from the Actions menu, select **Hide**.

**Note:**

You can hide the default Share Care Plan template. When all templates are hidden, the **Share Care Plan** link does not display in the Summary view for a client. For more information, see [Sharing care plans with others \(on page 241\)](#).

**Related information**

[Using webhooks notifications to retrieve data \(on page 445\)](#)

[Configuring external system references \(on page 241\)](#)

## Uploading images for a Share Care Plan template

You can upload organizational images or corporate logos to give Share Care Plan templates a brand identity. Such images show clients that a Share Care Plan generated from a particular organization.

Upload only the following types of file formats: jpg, jpeg, tif, tiff, gif, bmp or png. Uploaded files must be less than 500 KB in size.

For best results, upload images with dimensions of exactly 120 pixels by 40 pixels (width x height). If you upload images that exceed these dimensions, a distorted image might display in the Share Care Plan output.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Share the Care Plan**.  
The **Templates** page opens.
3. Select the **Images** tab.
4. Search for and select an image to upload.
5. Give the image a unique name, and you can provide a description.
6. Click **Save**.  
The Images page includes the new image.
7. To update an existing image, from the Actions menu, select **Edit** and repeat the previous steps.

## Managing the content of Share Care Plan templates

You can configure the contents of a Share Care Plan to show or hide specific content sections and section attributes. A care team member can download the Share Care Plan for a client with the required details.

### Showing or hiding Share Care Plan sections

You can configure the content of a Share Care Plan to show or hide specific content sections.

You can reorder content sections in the Share Care Plan template.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Share the Care Plan**.

The **Templates** page opens.

3. Click the Name hyperlink of a Share Care Plan.

The **Content** page of the template opens.

4. Review the available templates sections and determine which sections to include or exclude.

5. Use the **Show** and **Hide** actions to display the template section to the care team or hide it from view.

By default, templates sections are configured to be shown.

- To show a section of the template, from the **Actions** menu, select **Show**.
- To hide a section of the template, from the menu, select **Hide**.

6. To reorder the sequence of content sections in the template, click **Reorder**.

The **Reorder Content** page opens. Drag and drop the content sections to position them in your preferred order.

### Modifying report section attribute criteria

You can configure attribute criteria within sections of the Share Care Plan template to be shown or hidden from view so that the client or care team member recipient is not distracted by content that is no longer relevant.

In the upgraded template, you can use the Show and Hide actions to display attribute criteria to the care team within a section such as Conditions or Goals or hide the attribute criteria from view. In this way, the Share Care plan can focus on what's most relevant. For example you might want to only include Conditions that are Active or Primary.

## Modifying the Conditions section attribute criteria

You can modify the Conditions section attribute criteria so that only the most relevant information for a client is displayed in the Conditions section of the downloaded share care plan PDF.

You can configure the display name for the Conditions section that appears in the share care plan PDF. You can show or hide specific attributes from view in the Conditions section, and configure which condition records are shown. For example, all conditions regardless of their status, or only Resolved conditions.

1. Sign in with your administrator credentials.
2. Click **Care Planning > Share Care Plan**.  
The **Templates page** opens.
3. Click the name of a share care plan template.
4. From the **Actions** for the Conditions section, click **Edit**. The Edit Conditions page opens.
5. The name of the section is read-only. By default, this is the name that displays in Watson™ Care Manager and the share care plan PDF. You can specify a different display name of up to 50 characters to show in the share care plan PDF.
6. Review the available attributes and determine which ones to include or exclude. By default, all attributes are shown.
7. For each of the following attributes, select **Show** or **Hide** to display the attribute to the care team or hide it from view.
  - Source
  - Status
  - Classification
8. Optionally, specify Status Display Criteria options to filter the conditions records shown by Status, Active, Resolved, or both. By default, only Active conditions are displayed.
9. Optionally, specify Classification Display Criteria options to filter the conditions records shown by classification, Primary, Secondary, Unknown, or a combination of these classifications. By default, Primary, Secondary and Unknown conditions are displayed.
10. Click **Save**.

## Modifying the Goals section attribute criteria

You can modify the Goals section attribute criteria so that only the most relevant information for a client is displayed in the Goals section of the downloaded share care plan PDF.

You can configure the display name for the Goals section that appears in the share care plan PDF. You can show or hide specific attributes from view in the Goals section.

1. Sign in with your administrator credentials.
2. Click **Care Planning > Share Care Plan**.  
The **Templates page** opens.
3. Click the name of a share care plan template.
4. From the **Actions** for the Goals section, click **Edit**. The Edit Goals page opens.
5. The name of the section is read-only. The name displays in Watson™ Care Manager and the share care plan by default. You can specify a different display name of up to 50 characters to show in the share care plan report.
6. Review the available attributes and determine which ones to include or exclude. By default, all attributes are shown.
7. For each of the following attributes, select **Show** or **Hide** to display the attribute to the care team or hide it from view.
  - Description
  - Start Date
  - Target Date
  - Status
  - Latest Progress Note
8. Click **Save**.

## Modifying the Client Actions section attribute criteria

You can modify the Client Actions section attribute criteria so that only the most relevant information for a client is displayed in the Client Actions section of the downloaded share care plan PDF.

You can configure the display name for the Client Actions section that appears in the share care plan PDF. You can show or hide specific attributes from view in the Client Actions section. You can include client actions within related goals or they can be displayed as a separate section.

1. Sign in with your administrator credentials.
2. Click **Care Planning > Share Care Plan**.  
The **Templates page** opens.
3. Click the name of a share care plan template.
4. From the **Actions** for the Client Actions section, click **Edit**. The Edit Client Actions page opens.
5. The name of the section is read-only. The name displays in Watson™ Care Manager and the share care plan by default. You can specify a different display name of up to 50 characters to show in the share care plan report.

6. From the Shown As field, click **Separate Section** or **Within Related Goals**. By default, client actions are set to separate section if you create a new template. By default client actions are set within related goals if an existing template is copied or edited for the first time.
7. Review the available attributes and determine which ones to include or exclude. By default, all attributes are shown.
8. For each of the following attributes, select **Show** or **Hide** to display the attribute to the care team or hide it from view.
  - Description
  - Reason
  - Start Date
  - Target Date
  - Status
  - Latest Progress Note
  - Associated Goals (displayed only if it is Shown As = Separate Section)
9. Click **Save**.

## Modifying the Care Team Actions section attribute criteria

You can modify the Care Team Actions section attribute criteria so that only the most relevant information for a client is displayed in the Care Team Actions section of the downloaded share care plan PDF.

You can configure the display name for the Care Team Actions section that appears in the share care plan PDF. You can show or hide specific attributes from view. You can include care team actions within related goals or they can be displayed as a separate section.

1. Sign in with your administrator credentials.
2. Click **Care Planning > Share Care Plan**.  
The **Templates page** opens.
3. Click the name of a share care plan template.
4. From the **Actions** for the Care Team Actions section, click **Edit**. The Edit Care Team Actions page opens.
5. The name of the section is read-only. The name displays in Watson™ Care Manager and the share care plan by default. You can specify a different display name of up to 50 characters to show in the share care plan report.
6. From the Shown As field, click **Separate Section** or **Within Related Goals**. By default, care team actions are set to separate section if you create a new template. By default care team actions are set within related goals if an existing template is copied or edited for the first time.
7. Review the available attributes and determine which ones to include or exclude. By default, all attributes are shown.

8. For each of the following attributes, select **Show** or **Hide** to display the attribute to the care team or hide it from view.
  - Description
  - Assigned To
  - Reason
  - Start Date
  - Target Date
  - Status
  - Latest Progress Note
  - Associated Goals (displayed only if it is Shown As = Separate Section)
9. Optionally, you can specify Assigned To Display Criteria options to filter the care team records shown by User Sharing Care Plan (My Actions), Care Team Member, Care Team Role, or a combination of the values. By default, all values are selected.
10. Click **Save**.

## Modifying the Services section attribute criteria

You can modify the Services section attribute criteria so that only the most relevant information for a client is displayed in the Services section of the downloaded share care plan PDF.

You can configure the display name for the Services section that appears in the share care plan PDF. You can show or hide specific attributes from view in the Services section, and configure which Services records are shown. For example, all services regardless of their status, or only Open services.

1. Sign in with your administrator credentials.
2. Click **Care Planning > Share Care Plan**.  
The **Templates page** opens.
3. Click the name of a share care plan template.
4. From the **Actions** for the Services section, click **Edit**. The Edit Services page opens.
5. The name of the section is read-only. By default, this is the name that displays in Watson™ Care Manager and the share care plan PDF. You can specify a different display name of up to 50 characters to show in the share care plan PDF.
6. Review the available attributes and determine which ones to include or exclude. By default, all attributes are shown.
7. For each of the following attributes, select **Show** or **Hide** to display the attribute to the care team or hide it from view.
  - Description
  - Associated Goals
  - Provider

- Provider Phone Number
  - Start Date
  - Expected End Date
  - Status
8. Optionally, specify Status Display Criteria options to filter the services records shown by Status, Open, Closed, or both. By default, both values are displayed.
9. Optionally, specify Outcome Display Criteria options to filter the services records shown by classification, Successful, Not Successful, Abandoned, or a combination of these classifications. By default, all values are displayed.
10. Click **Save**.

## Modifying the Barriers section attribute criteria

You can modify the Barriers section attribute criteria so that only the most relevant information for a client is displayed in the Barriers section of the downloaded share care plan PDF.

You can configure the display name for the Barriers section that appears in the share care plan PDF. You can show or hide specific attributes from view in the Barriers section, and configure which barriers records are shown. For example, all barriers regardless of their status, or only Resolved barriers.

1. Sign in with your administrator credentials.
2. Click **Care Planning > Share Care Plan**.  
The **Templates page** opens.
3. Click the name of a share care plan template.
4. From the **Actions** for the Barriers section, click **Edit**. The Edit Barriers page opens.
5. The name of the section is read-only. By default, this is the name that displays in Watson™ Care Manager and the share care plan PDF. You can specify a different display name of up to 50 characters to show in the share care plan PDF.
6. Review the available attributes and determine which ones to include or exclude. By default, all attributes are shown.
7. For each of the following attributes, select **Show** or **Hide** to display the attribute to the care team or hide it from view.
  - Status
  - Status Date
  - Note
  - Comments
8. Optionally, specify Status Display Criteria options to filter the barriers records shown by Open, Resolved, or both. By default, both records are displayed.
9. Click **Save**.

## Modifying the Care Team section attribute criteria

You can modify the Care Team section attribute criteria so that only the most relevant information for a client is displayed in the Care Team section of the downloaded share care plan PDF.

You can configure the display name for the Care Team section that appears in the share care plan PDF. You can show or hide specific attributes from view in the Care Team section, and configure which care team records are shown. For example, all care teams regardless of their status, or only Primary care teams.

1. Sign in with your administrator credentials.
2. Click **Care Planning > Share Care Plan**.  
The **Templates page** opens.
3. Click the name of a share care plan template.
4. From the **Actions** for the Care Team section, click **Edit**. The Edit Care Team page opens.
5. The name of the section is read-only. By default, this is the name that displays in Watson™ Care Manager and the share care plan PDF. You can specify a different display name of up to 50 characters to show in the share care plan PDF.
6. Review the available attributes and determine which ones to include or exclude. By default, all attributes are shown.
7. Optionally, specify Care Team Display Criteria options to filter the care team records shown by Primary, Core, or both. By default, both records are displayed.
8. For each of the following attributes, select **Show** or **Hide** to display the attribute to the care team or hide it from view.
  - Roles
  - Primary
  - Core
  - Phone Number
9. Click **Save**.

## Modifying the Social Networks section attribute criteria

You can modify the Social Networks section attribute criteria so that only the most relevant information for a client is displayed in the Social Networks section of the downloaded share care plan PDF.

You can configure the display name for the Social Networks section that appears in the share care plan PDF. You can show or hide specific attributes from view in the Social Networks section, and configure which social networks records are shown.

1. Sign in with your administrator credentials.
2. Click **Care Planning > Share Care Plan**.  
The **Templates page** opens.
3. Click the name of a share care plan template.
4. From the **Actions** for the Social Networks section, click **Edit**. The Edit Social Networks page opens.
5. The name of the section is read-only. By default, this is the name that displays in Watson™ Care Manager and the share care plan PDF. You can specify a different display name of up to 50 characters to show in the share care plan PDF.
6. Review the available attributes and determine which ones to include or exclude. By default, all attributes are shown.
7. For each of the following attributes, select **Show** or **Hide** to display the attribute to the care team or hide it from view.
  - Role
  - Relationship To Client
  - Phone Number
  - Primary Contact
8. Optionally, specify Primary Contact Display Criteria options to filter the social networks records shown by Primary, Non Primary or both. By default, both records are displayed.
9. Click **Save**.

## Modifying the Programs section attribute criteria

You can modify the Programs section attribute criteria so that only the most relevant information for a client is displayed in the Programs section of the downloaded share care plan PDF.

You can configure the display name for the Programs section that appears in the share care plan PDF. You can show or hide specific attributes from view in the Programs section, and configure which program records are shown. For example, all programs regardless of their status, or only Enrolled programs.

1. Sign in with your administrator credentials.
2. Click **Care Planning > Share Care Plan**.  
The **Templates page** opens.
3. Click the name of a share care plan template.
4. From the **Actions** for the Programs section, click **Edit**. The Edit Programs page opens.
5. The name of the section is read-only. By default, this is the name that displays in Watson™ Care Manager and the share care plan PDF. You can specify a different display name of up to 50 characters to show in the share care plan PDF.
6. Review the available attributes and determine which ones to include or exclude. By default, all attributes are shown.

7. For each of the following attributes, select **Show** or **Hide** to display the attribute to the care team or hide it from view.
  - Status
  - Status Date
  - Assigned On
8. Optionally, specify Status Display Criteria options to filter the programs records shown by Assigned, Pending, Enrolled, Disenrolled, Not Enrolled, Completed or a combination of the records. By default, all records are displayed.
9. Click **Save**.

## Modifying the Assessments section attribute criteria

You can modify the Assessments section attribute criteria so that only the most relevant information for a client is displayed in the Assessments section of the downloaded share care plan PDF.

You can configure the display name for the Assessments section that appears in the share care plan PDF. You can show or hide specific attributes from view in the Assessments section, and configure which assessments records are shown. For example, all assessments regardless of their completed date, or only assessments completed in the last two weeks.

1. Sign in with your administrator credentials.
2. Click **Care Planning > Share Care Plan**.  
The **Templates page** opens.
3. Click the name of a share care plan template.
4. From the **Actions** for the Assessments section, click **Edit**. The Edit Assessments page opens.
5. The name of the section is read-only. By default, this is the name that displays in Watson™ Care Manager and the share care plan PDF. You can specify a different display name of up to 50 characters to show in the share care plan PDF.
6. Review the available attributes and determine which ones to include or exclude. By default, all attributes are shown.
7. Optionally, specify Type Display Criteria options to filter the assessments records shown by Score Only, Script, or both. By default, both records are displayed.
8. For each of the following attributes, select **Show** or **Hide** to display the attribute to the care team or hide it from view.
  - Completed By
  - Completed Date
9. Optionally, specify Completed Date (In Weeks) Display Criteria. Enter a value less than or equal to 26. If you don't enter a value, assessments completed in the last two years are displayed.
10. Click **Save**.

## Modifying the Notes section attribute criteria

You can modify the Notes section attribute criteria so that only the most relevant information for a client is displayed in the Notes section of the downloaded share care plan PDF.

You can configure the display name for the Notes section that appears in the share care plan PDF. You can show or hide specific attributes from view in the Notes section, and configure which notes records are shown. For example, all notes or only notes that are not sensitive.

1. Sign in with your administrator credentials.
2. Click **Care Planning > Share Care Plan**.  
The **Templates** page opens.
3. Click the name of a share care plan template.
4. From the **Actions** for the Notes section, click **Edit**. The Edit Notes page opens.
5. The name of the section is read-only. By default, this is the name that displays in Watson™ Care Manager and the share care plan PDF. You can specify a different display name of up to 50 characters to show in the share care plan PDF.
6. Review the available attributes and determine which ones to include or exclude. By default, all attributes are shown.
7. If configured, in the **Include Sensitive Notes** field, select **Yes** or **No**. Selecting Yes makes the sensitive note visible to you and other users who have been granted a security role with access to the client's sensitive notes.
8. Optionally, specify one or more Status Display Criteria from **Draft**, **Ready for review** and **Final** options. By default, all values are selected. You cannot unselect **Final** value.
9. For each of the following attributes, select **Show** or **Hide** to display the attribute to the care team or hide it from view.
  - Type Display Criteria.
  - Source
  - Status
  - Created Date
  - Created By
  - Updated Date
  - Updated By
  - Comments
10. Optionally, select a value in the **Created/Updated Date (In Weeks) Display Criteria** field. By default, the value is 26.
11. Click **Save**.

## Modifying Touchpoints section attribute criteria

You can modify the Touchpoints section attribute criteria so that only the most relevant information for a client is displayed in the Touchpoints section of the downloaded share care plan PDF.

You can configure the display name for the Touchpoints section that appears in the share care plan PDF. You can show or hide specific attributes from view in the Touchpoints section, and configure which notes records are shown. For example, all Touchpoint regardless of their status, or only **Ready for review** touchpoints.

1. Sign in with your administrator credentials.
2. Click **Care Planning > Share Care Plan**.  
The **Templates page** opens.
3. Click the name of a share care plan template.
4. From the **Actions** for the Touchpoints section, click **Edit**. The Edit Touchpoints page opens.
5. The name of the section is read-only. By default, this is the name that displays in Watson™ Care Manager and the share care plan PDF. You can specify a different display name of up to 50 characters to show in the share care plan PDF.
6. Review the available attributes and determine which ones to include or exclude. By default, all attributes are shown.
7. If configured, in the **Include Sensitive Notes** field, select **Yes** or **No**. Selecting Yes makes the sensitive note visible to you and other users who have been granted a security role with access to the client's sensitive notes.
8. Optionally, specify one or more Status Display Criteria from **Draft**, **Ready for review** and **Final** options. By default, all values are selected. You cannot unselect **Final** value.
9. For each of the following attributes, select **Show** or **Hide** to display the attribute to the care team or hide it from view.
  - Source
  - Status
  - Duration
  - Programs
  - Validated Identity
  - Created By
  - Updated Date
  - Updated By
  - Comments
10. Optionally, select a value in the **Created/Updated Date (In Weeks) Display Criteria** field. By default, the value is 26.
11. Click **Save**.

## Modifying the Allergies section attribute criteria

You can modify the Allergies section attribute criteria so that only the most relevant information for a client is displayed in the Allergies section of the downloaded share care plan PDF.

You can configure the display name for the Allergies section that appears in the share care plan PDF.

You can show or hide specific attributes from view in the Allergies section, and configure which allergies records are shown. For example, all allergies regardless of their status, or only Active allergies.

1. Sign in with your administrator credentials.
2. Click **Care Planning > Share Care Plan**.  
The **Templates** page opens.
3. Click the name of a share care plan template.
4. From the **Actions** for the Allergies section, click **Edit**. The Edit Allergies page opens.
5. The name of the section is read-only. By default, this is the name that displays in Watson™ Care Manager and the share care plan PDF. You can specify a different display name of up to 50 characters to show in the share care plan PDF.
6. Review the available attributes and determine which ones to include or exclude. By default, all attributes are shown.
7. Optionally, specify Display Criteria options to filter the allergies records shown by Current, Other, or both. By default, Current is selected in new templates. In existing templates, the previous selection is displayed.
8. For each of the following attributes, select **Show** or **Hide** to display the attribute to the care team or hide it from view.
  - Reaction
  - Severity
  - Source
  - Current
  - Status
9. Optionally, specify Status Display Criteria options to filter the allergies records shown by Active, Unknown, or both. By default, both records are displayed.
10. Click **Save**.

## Modifying the Medications section attribute criteria

You can modify the Medications section attribute criteria so that only the most relevant information for a client is displayed in the Medications section of the downloaded share care plan PDF.

You can configure the display name for the Medications section that appears in the share care plan PDF. You can show or hide specific attributes from view in the Medications section, and configure which

medication records are shown. For example, all medications regardless of their status, or only Unknown medications.

1. Sign in with your administrator credentials.
2. Click **Care Planning > Share Care Plan**.  
The **Templates page** opens.
3. Click the name of a share care plan template.
4. From the **Actions** for the Medications section, click **Edit**. The Edit Medications page opens.
5. The name of the section is read-only. By default, this is the name that displays in Watson™ Care Manager and the share care plan PDF. You can specify a different display name of up to 50 characters to show in the share care plan PDF.
6. Review the available attributes and determine which ones to include or exclude. By default, all attributes are shown.
7. Optionally, specify Display Criteria options to filter the medications records shown by Currently Taking, Other, or both. By default, Currently Taking is selected in new templates. In existing templates, the previous selection is displayed.
8. For each of the following attributes, select **Show** or **Hide** to display the attribute to the care team or hide it from view.
  - SIG
  - Start Date
  - Source
  - Currently Taking
  - Status
9. Optionally, specify Status Display Criteria options to filter the medication records shown by Active, Unknown, or both. By default, both records are displayed.
10. Click **Save**.

## Modifying the Recent Vitals section attribute criteria

You can modify the Recent Vitals section attribute criteria so that only the most relevant information for a client is displayed in the Recent Vitals section of the downloaded share care plan PDF.

You can configure the display name for the Recent Vitals section that appears in the share care plan PDF. You can show or hide specific attributes from view in the Recent Vitals section.

1. Sign in with your administrator credentials.
2. Click **Care Planning > Share Care Plan**.  
The **Templates page** opens.
3. Click the name of a share care plan template.

4. From the **Actions** for the Recent Vitals section, click **Edit**. The Edit Recent Vital page opens.
5. The name of the section is read-only. By default, this is the name that displays in Watson™ Care Manager and the share care plan PDF. You can specify a different display name of up to 100 characters to show in the share care plan PDF.
6. Review the available attributes and determine which ones to include or exclude. By default, all attributes are shown.
7. For each of the following attributes, select **Show** or **Hide** to display the attribute to the care team or hide it from view.
  - Measurement Date
  - Source
8. Optionally, specify Measurement Date (In Weeks) Display Criteria. Enter a value less than or equal to 26. If you don't enter a value, then only the latest record is displayed. If no vitals records exists, then this attribute criteria does not display.
9. Click **Save**.

## Modifying the Custom Client data types section attribute criteria

You can modify the Custom Client data types section attribute criteria so that only the most relevant information for a client is displayed in the Custom Client data types section of the downloaded share care plan PDF.

You can configure the display name for the Custom Client data types section that appears in the share care plan PDF.

1. Sign in with your administrator credentials.
2. Click **Care Planning > Share Care Plan**.  
The **Templates page** opens.
3. Click the name of a share care plan template.
4. Select a configured client data type version.
5. From the **Actions** for the Custom Client data types section, click **Edit**. The Edit Custom Client data types page opens.
6. The name of the section is **Display Name**. You can specify a different display name of up to 100 characters to show in the share care plan PDF. By default, the Name is the custom client data type, its version and if available, its effection version. The Name is read-only.
7. Review the available attributes and determine which ones to include or exclude. By default, all attributes are shown.

8. Select the number of custom client data types records. By default the number of records is set to 20. Click the vertical stepper to increase or decrease the count. The minimum value is 1 and the maximum value is 20.
9. Click **Save**.

## Configuring names of Share Care Plan template recipients

Configure a library of names of intended recipients of a Share Care Plan template for the care team to choose when they send a client's share care plan to external parties (via an API). You can edit a name after you create it. You can configure whether a name is made available to the care team to select when they send the Share Care Plan template.

### Creating Share Care Plan template recipient names

You can create a library of names of intended recipients for a Share Care Plan template to make available for use by care teams when they send the template to external parties (via an API).

You can associate an external system reference with the name that you are adding. When sending the name as an API attribute, the external system identifies the name by its external system reference.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Share Care Plan**.  
The **Templates** page opens.
3. Select the **Share With** tab.  
Configured names are listed. The **Display** state indicates whether names that are configured in the application are available to the care team to use. The External System Reference displays the reference that the external system uses to identify the name.
4. Click **New**.  
The **New Name** page opens.
5. Enter a unique name of up to 100 characters.
6. **Optional:** In the **External System Reference** field, enter a unique reference number of up to 20 alphanumeric characters.
7. Click **Save**.

### Modifying Share Care Plan template recipient names

In the library of configured Share Care Plan template recipient names, you can update a name for the care team to choose when they send a client's template to external parties (via an API). You can configure the

library to show or hide specific names. You can reorder names so that the most relevant names display first according to your organization's needs.

You can update a name and if not previously configured, you can associate a new external system reference with the name record. When sending a name as an API attribute, the external system identifies the name by its external system reference. If you update an existing external system reference that was previously configured and is already in use in existing integrations, you might cause existing integrations to fail.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Share Care Plan**.  
The **Templates** page opens.
3. Select the **Share With** tab.  
Configured names are listed.
4. To update an existing name, from the Actions menu, select **Edit** and enter a unique name.
5. In the External System Reference field, enter a unique reference number of up to 20 alphanumeric characters.
6. Click **Save**.
7. Use the **Show** and **Hide** actions to display a name to the care team or hide one from view. By default, newly-created names are configured to be shown.
  - To show the name, from the Actions menu, select **Show**.
  - To hide the name, from the Actions menu, select **Hide**.
8. To reorder the sequence of names, click **Reorder**.  
The **Reorder Names** page opens. Drag and drop the names to position them in your preferred order, and click **Save**.

## Upgrading Share Care Plan templates

You can upgrade the default Share Care Plan template in the library of configured templates to a newer format. Existing templates remain as they are unless you edit or copy them. When you edit or copy an existing template, the upgraded template is applied but the existing content is retained. Any future enhancements to the Share Care Plan report template only affects the upgraded template.

Upgrading the default Share Care Plan template cannot be undone.

Until you upgrade a template to the newer version, the care team can use the existing template to generate a share care plan. When you upgrade an existing template, the share care plan content and display status is retained. In addition, upgrading the template adds a new Services section to the template and updates some section names.

After you upgrade an existing template, activated custom client data type versions that are marked to be included in the Share Care Plan is also included. You can only add custom client data types to upgraded templates.

When your organization marks an activated custom client data type to be included in the share care plan as 'Yes' and creates a new version for the client data type that is marked to be included in the share care plan and activates this version, all these active custom data type versions are added to the existing custom created share care plan with a display status set to Hidden. The attributes for the active versions of client data type are set to Shown always. The care manager can mark the relevant version of custom client data type sections as Shown.

Upon upgrading the Default Share Care Plan, if there are custom client data types with at least one active version and it is indicated to be included in the share care plan, then all custom client data type versions will be added as a section with display value set to Hidden. If the share care plan is copied, if there are custom client data types with at least one active version and it is indicated to be included in the share care plan, then all custom client data type versions will be added as a section with display value set to Hidden.

1. Sign in with your administrator credentials. Your home page opens.
2. Click **Care Planning > Share Care Plan > Templates > Default Share Care Plan**.
3. Click **Upgrade** in the row-level action menu. The existing template format is updated to the latest template configuration while retaining the information contained in the existing template.
4. Click **Save**.

## Editing Share Care Plan templates

You can edit a configured template in the library of Share Care Plan templates. The care team can select the template when they generate a Share Care Plan for a client.

When you edit an existing template, the current template content is mapped to the modified content in the new template and is available for selection or removal. The Select Sections drop down displays the updated sections in the new template. You can add an uploaded image or organization logo to the template to show that the Share Care Plan is from that organization. If you want to publish Client Actions or Care Team Actions on the Share Care Plan, you must select Goals.

1. Sign in with your administrator credentials. Your home page opens.
2. Click **Care Planning > Share Care Plan**. The Templates page opens.
3. Click the name of a share care plan template.
4. Review the template Name, External System Reference, Image and Description and determine what updates you want to make.

5. Review the available template sections and determine which sections to include or exclude.
6. Optionally, include custom client data types that were configured to be included in the Share Care Plan. Client data types are selected by default. If the custom client data type name is more than 80 characters, the extra characters are truncated, and the effective date is appended. If the effecton version is available, it is also appended.
7. Click **Save** to save changes and return to the Templates home page.
8. Click **Cancel** to return to the Templates home page.

## Deleting Share Care Plan templates

If a configured Share Care Plan template is incorrect or obsolete, you can delete it.

Care teams use templates to generate Share Care Plan templates to download and share with others or to send to external parties (via an API). If you delete a Share Care Plan template that is use in existing integrations, you might cause existing integrations to fail.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Share the Care Plan**.  
The **Templates** page opens.
3. From the **Actions** menu of the template, click **Delete**. The Delete Template page opens.
4. Click **Delete**.

## Configuring resources for the care team

You can configure pages to enable a care team to capture consent records and create a referral for a client during the client registration process.

### Configuring Register Client wizard pages

You can configure the following pages for the care team to complete with clients as a mandatory or optional step in the client registration process: **Capture Consent Records** and **New Referral**.

The **Capture Consent Records** page is required by a care team to categorize a client's consent records by information type, for example, Consent for Disclosure. The **New Referral** page is required by a care team who want to refer a client for care management as they are registering them in the application.

By default, the listed pages are configured to be hidden from the care team's view and excluded from the **Register Client** wizard. Use the row-level **Show as Mandatory/Optional** and **Hide** actions to control the display of each resource in the context of the **Register Client** wizard.

If organization units are enabled for your organization, the **New Referral** page must be included in the **Register Client** wizard so that a referral is created every time a care team member registers a new client in Watson™ Care Manager and the referral is routed to the correct organization unit.

1. Sign in with your administrator credentials.

Your home page opens.

2. Select **Client Data > General>Client Registration**.

The **Client Registration** page opens.

3. Use the **Show** and **Hide** actions to display or hide the list pages.

- To include a list page in the Register Client wizard and to require the care team to complete it with clients, from the **Actions** menu, select **Show as Mandatory**. Confirm the action. When configured as mandatory, care team members must capture consent records or create a new referral while registering a client in the application.
- To include a list page in the Register Client wizard and allow the care team to optionally complete it with clients, from the **Actions** menu, select **Show as Optional**. Confirm the action. When configured as optional, care team members can but are not required to capture consent records or create a new referral while registering a client in the application.

If organization units are enabled for your organization, you cannot configure the New Referral page to be shown as optional in the Register Client wizard. Referrals are mandatory while registering a client.

- To exclude a list page from the Register Client wizard, from the **Actions** menu, select **Hide**. Confirm the action.

If organization units are enabled for your organization, you cannot configure the New Referral page to be hidden and unavailable to the care team in the Register Client wizard. Referrals are mandatory while registering a client.

## Configuring for supervisors

You can configure the capacity ranges that govern the workload distribution for care managers in the organization. You can also configure unassigned day ranges to help supervisors identify any clients who are unassigned to a care team for care management.

### Configuring care team capacity ranges

Capacity ranges are used to group care managers into categories by their capacity. You can modify the start and end range values for each category to suit the needs of your organization. Capacity ranges are

displayed in a capacity chart on the Supervisor workspace and show the workload distribution for care managers in the organization.

Capacity is organized in four categories: Low, Medium, High, and Over Capacity. Each care manager is assigned an individual capacity. The Supervisor workspace capacity chart groups and displays care managers in the relevant category according to their individual capacity. For example, care managers who have a capacity that is greater than 100 percent belong in the Over Capacity category.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Supervisor > Capacity Ranges**.

Configured capacity ranges are displayed.

3. Modify the range values for any capacity category by completing the following steps:

- a. Click **Edit**.

- b. Update the start and end range values for each category, as a percentage.

- c. Click **Save**.

## Configuring unassigned referral day ranges

You can configure ranges to show a supervisor how many days client referrals remain unassigned to a care manager since their referral was received in the application. Unassigned referral day ranges are displayed on the Unassigned Referrals chart in the Supervisor workspace.

Three default ranges are available in the application: 0 - 6 days, 7 - 13 days, and equal to or greater than 14 days. You can modify the start and end values in each range to suit the needs of your organization.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Supervisor > Unassigned Referral Day Ranges**.

Configured referral day ranges are displayed.

3. Modify the values for any day range by completing the following steps:

- a. Click **Edit**.

- b. Update the start and end values for each range, in days.

- c. Click **Save**.

## Configuring utilization

*Utilization* is the measure of a client's use of the clinical services that are available to them. Care teams record the utilization of clinical services for clients, such as hospital encounters or specialist visits.

Organization can use this information to understand the usage and outcome patterns for services to drive improvements. For example, they can track admissions to reduce readmission.

You can configure utilization types, sources, and dispositions for your organization and make them available for use by care teams.

## Configuring utilization types

Care team members can select a type when they record the utilization of a clinical service for clients. You can configure a library of types for use by care teams.

Utilization types indicate the types of services that clients can visit for clinical care, for example, an Emergency Room, acute hospital, or hospice. You can add, edit, and delete types.

## Creating types

By default, only one type, *Other*, comes with the product to allow the care team to record a specific type of clinical service that is not already configured. You can add new types to the library to suit the needs of your organization.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Utilization**.  
The tabs in the **Utilization Types** library contain a list of configurable types, sources, and dispositions. Types are displayed by default.
3. Click **New**.  
The **New Utilization Type** page opens.
4. Enter a unique name that does not duplicate any existing type in the library.



### Tip:

Enter a minimum of three characters.

5. Click **Save** to add the type to the library.

## Modifying types

With the exception of the *Other* type, you can edit the name of existing types.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Utilization**.

Configured types are displayed by default.

3. Click the **Actions** menu of the type, and click **Edit**.

The **Edit Utilization Type** page opens.

4. Enter a unique name that does not duplicate any existing type in the library.



**Tip:**

Enter a minimum of three characters.

5. Click **Save** to update the type in the library.

## Deleting types

If a configured type is incorrect or obsolete, you can delete it with the exception of the *Other* type.

When you delete a type, the care team can no longer select that type when they create a new utilization. However, any existing utilization that references the deleted type are not affected. The care team can continue to add comments to those notes.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Utilization**.

Configured types are displayed by default.

3. Click the **Actions** menu of the type, and click **Delete**.

The **Delete Utilization Type** page opens.

4. Confirm that you want to delete the type by clicking **Delete**.

## Configuring utilization locations

Care team members can select a location when they record the utilization of a clinical service for clients.

You can configure a library of locations for use by care teams.

A utilization location is the name of the facility where a client availed of health services, for example, the name of a hospital, hospice, or rehabilitation center. You can add, edit, and delete locations.

## Creating locations

By default, only one location, *Other*, comes with the product to allow the care team to record a specific clinical service location that is not already configured. You can add new locations to the library to suit the needs of your organization.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Utilization**.

The tabs on the **Utilization** page contain a list of configurable types, locations, sources, and dispositions. Types are displayed by default.

3. Select the **Locations** tab.

4. Click **New**.

The **New Utilization Location** page opens.

5. Enter a unique name that does not duplicate any existing location in the library.



**Tip:**

Enter a minimum of three characters.

6. Click **Save** to add the location to the library.

## Modifying locations

With the exception of the *Other* location, you can edit the name of existing locations.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Utilization**.

Configured types are displayed by default.

3. Select the **Locations** tab.

4. Click the **Actions** menu of the location, and click **Edit**.

The **Edit Utilization Location** page opens.

5. Enter a unique name that does not duplicate any existing location in the library.



**Tip:**

Enter a minimum of three characters.

6. Click **Save** to update the location in the library.

## Deleting locations

If a configured location is incorrect or obsolete, you can delete it with the exception of the *Other* location.

When you delete a location, the care team can no longer select that location when they create a new utilization. However, any existing utilization that references the deleted location are not affected. The care team can continue to add comments to those notes.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Utilization**.  
Configured types are displayed by default.
3. Select the **Locations** tab.
4. Click the **Actions** menu of the location, and click **Delete**.  
The **Delete Utilization Location** page opens.
5. Confirm that you want to delete the location by clicking **Delete**.

## Configuring utilization sources

Care team members can select a source when they record the utilization of a clinical service for clients. You can configure a library of sources for use by care teams.

The utilization source indicates who is providing information about the clinical services that clients use. For example, your organization might receive service utilization information from the client, a caregiver, or a hospital. You can add, edit, and delete sources.

## Creating sources

By default, only one type, *Other*, comes with the product to allow the care team to record a specific source that is not already configured. You can add new sources to the library to suit the needs of your organization.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Utilization**.  
The tabs in the **Utilization Types** library a list of configurable types, sources, and dispositions.  
Types are displayed by default.
3. Select the **Sources** tab.
4. Click **New**.  
The **New Utilization Source** page opens.
5. Enter a unique name that does not duplicate any existing source in the library.



**Tip:**

Enter a minimum of three characters.

6. Click **Save** to add the source to the library.

## Modifying sources

With the exception of the *Other* source, you can edit the name of existing sources.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Utilization**.  
Configured types are displayed by default.
3. Select the **Sources** tab.
4. Click the **Actions** menu of the source, and click **Edit**.  
The **Edit Utilization Source** page opens.
5. Enter a unique name that does not duplicate any existing source in the library.



**Tip:**

Enter a minimum of three characters.

6. Click **Save** to update the source in the library.

## Deleting sources

If a configured source is incorrect or obsolete, you can delete it with the exception of the *Other* source.

When you delete a source, the care team can no longer select that source when they create a new utilization. However, any existing utilization that references the deleted source are not affected. The care team can continue to add comments to those notes.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Utilization**.  
Configured types are displayed by default.
3. Select the **Sources** tab.
4. Click the **Actions** menu of the source, and click **Delete**.

The **Delete Utilization Source** page opens.

5. Confirm that you want to delete the source by clicking **Delete**.

## Configuring utilization dispositions

Care team members can select a disposition when they record the utilization of a clinical service for clients. You can configure a library of dispositions for use by care teams.

Utilization dispositions indicate the outcomes for clients after they avail of clinical services. For example, after a stay in a hospital, a client might go home or go to a skilled nursing facility (SNF). You can add, edit, and delete dispositions.

## Creating dispositions

By default, only one type, *Other*, comes with the product to allow the care team to record a specific type of disposition that is not already configured. You can add new dispositions to the library to suit the needs of your organization.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Utilization**.

The tabs on the **Utilization** page contain a list of configurable types, sources, and dispositions.

Types are displayed by default.

3. Select the **Dispositions** tab.

4. Click **New**.

The **New Utilization Disposition** page opens.

5. Enter a unique name that does not duplicate any existing disposition in the library.



**Tip:**

Enter a minimum of three characters.

6. Click **Save** to add the disposition to the library.

## Modifying dispositions

With the exception of the *Other* type, you can edit the name of existing dispositions.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Utilization**.

Configured types are displayed by default.

3. Select the **Dispositions** tab.
4. Click the **Actions** menu of the disposition, and click **Edit**.

The **Edit Utilization Disposition** page opens.

5. Enter a unique name that does not duplicate any existing disposition in the library.



**Tip:**

Enter a minimum of three characters.

6. Click **Save** to update the disposition in the library.

## Deleting dispositions

If a configured disposition is incorrect or obsolete, you can delete it with the exception of the *Other* disposition.

When you delete a disposition, the care team can no longer select that disposition when they create a new utilization. However, any existing utilization that references the deleted disposition are not affected. The care team can continue to add comments to those notes.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Utilization**.  
Configured types are displayed by default.
3. Select the **Dispositions** tab.
4. Click the **Actions** menu of the disposition, and click **Delete**.  
The **Delete Utilization Disposition** page opens.
5. Confirm that you want to delete the disposition by clicking **Delete**.

## Configuring notes

Care teams record notes about clients in different places in the application to address different aspects of client care. You can configure a library of note types for the care team to associate with client notes, and set options to allow or prevent note editing and note sharing with external parties.

You can configure the note types, external systems, and delete note reasons for your organization and make them available for care teams to use.

## Configuring note types

You can configure a library of note types for a care team to associate with a client note.

Note types classify the nature of the note and can be categorized by activity as follows: Access and Continuity, Assessment, Care Management, Care Plan Update, Chart Review, Comprehensive Assessment, Comprehensiveness and Coordination, Educational Information, General, Letters, Population Health, Private, Private to Role, Quality Review, Touch point, or Wellness.

You can add note types and edit the attributes of existing types.

### Default note types

The following notes types are available, and with the exception of the Touchpoint note type, can be shown or hidden from the care team.



#### Note:

Private and Private To Role notes types are hidden by default. So if you configure this note type to be shown, you must show the Private Note summary card also. For more information, see [Modifying summary cards \(on page 27\)](#).

Note types for Services and Barriers can't be shown or hidden. Team members can't add a note with the note type Services or Barriers. When team members add a note for a service, the Note Type is set to Service. When team members add a note for a barrier, the Note Type is set to Barrier. You can configure note sharing options, associate an external system reference, and configure Barrier and Service note types so that team members can edit them.

By default, the Touchpoint note type is always shown and cannot be hidden.

By default, the Form note type is always shown and is only available for use with families. The reason is that a care team member can't conduct a stand-alone questionnaire with a client and add a note of type Form to that questionnaire. As a result, ensure that the Form note type is set to hidden when you are working with clients.

- Access and Continuity
- Assessment
- Care Management
- Care Plan Update
- Chart review
- Comprehensive assessment

- Comprehensiveness and Coordination
- Educational Information
- External
- Form
- General
- Intake
- Letters
- Population Health
- Private
- Private To Role
- Quality Review
- Touchpoint
- Wellness
- Barrier
- Service

## Creating types

If a suitable note type does not exist in the library of configured types, you can create a new note type for the care team to use. You can configure options to allow or prevent editing of the note type or note sharing with external systems. You can allow or prevent the team from overriding your configuration.

You can configure note sharing options for all note types except Private and Private to Role note types.

You can associate an external system reference with the note type that you are configuring so that incoming data from an external API can be mapped to the configured note type in Watson™ Care Manager.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Notes**.

The tabs in the **Notes** library contain a list of configurable note types, external systems for note sharing, and delete note reasons. Note types are displayed by default.

3. Click **New**.

The **New Note Type** page opens.

4. Enter a unique name that does not duplicate any existing note type in the library.

5. To allow or prevent editing of the note type by the care team, select or clear the **Editable** check box.

By default, a note type is not selected for editing.

6. In the **External System Reference** field, enter a unique reference number of up to 20 alphanumeric characters to associate with the note type that you are creating.  
When sending a note type as an API attribute, the external system identifies the note type by its external system reference.
7. To allow or prevent sharing of notes of this type with external parties, select or clear the **Share** check box.  
By default, a note type is not selected for sharing.
8. If you selected to allow note sharing, choose one or more of the configured external parties with whom the care team can share the note type.
9. To allow or prevent overriding of your note sharing options, select or clear the **Share with Override** check box.
10. Click **Save** to add the type to the library.

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#### Related information

[Configuring external system references \(on page 241\)](#)

## Modifying types

You can update the attributes of a note type in the library of configured types.

You can configure note sharing options for all note types except Private and Private to Role note types.

You can associate an external system reference with the note type that you are configuring so that incoming data from an external API can be mapped to the configured note type in Watson™ Care Manager.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Notes**.  
The tabs in the **Notes** library contain a list of configurable note types, external systems for note sharing, and delete note reasons. Note types are displayed by default.
3. Click the **Actions** menu of the type, and click **Edit**.  
The **Edit Note Type** page opens.
4. Enter a unique name that does not duplicate any existing type in the library.
5. Change the previous setting to allow or prevent editing of the note type by the care team. Select or clear the **Editable** check box.  
When you make a note type editable or not editable, existing note types that are in a **Final** state are not affected.

6. In the **External System Reference** field, enter a unique reference number of up to 20 alphanumeric characters to associate with the note type that you are updating.  
When sending a note type as an API attribute, the external system identifies the note type by its external system reference.
7. To allow or prevent sharing of notes of this type with external parties, select or clear the **Share** check box.  
By default, a note type is not selected for sharing.
8. If you selected to allow note sharing, choose one or more of the configured external parties with whom the care team can share the note type.
9. To allow or prevent overriding of your note sharing options, select or clear the **Share with Override** check box.
10. Click **Save** to update the type in the library.

## Configuring reasons for note deletions

Care team members can select a reason for deleting a client note in the application. You can configure a library of delete note reasons for use by care teams.

For example, a care team member might want to delete a client note that was mistakenly entered. By default, the application comes with the following delete note reasons: Incorrect information, Entered for incorrect client, Care Manager request, and Other.

You can add and edit reasons for deleting client notes.

## Adding reasons

If a suitable delete note reason does not exist in the library of configured reasons, you can add a new reason. The reasons that you configure become available to the care team to select when they delete client notes.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Care Planning > Notes**.  
The tabs in the **Notes** library contain a list of configurable types, external systems, and delete reasons. Types are displayed by default.
3. Select the **Delete Reasons** tab.
4. Click **New**.  
The **New Delete Note Reason** page opens.
5. Enter a unique reason that does not duplicate any existing delete note reason in the library.
6. Click **Save** to add the delete reason to the library.

The **Delete Note Reasons** list opens.

7. Use the **Show** and **Hide** actions to display the delete note reason to the care team or hide it from view.
  - a. To hide the reason, from the Actions menu, select **Hide**.
  - b. To show the reason, from the Actions menu, select **Show**.

## Modifying reasons

You can update a delete note reason. When you change the name of a delete note reason in the library of configured reasons, all existing instances in client records are updated.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Notes**.

The tabs in the **Notes** library contain a list of configurable types, external systems, and delete reasons. Types are displayed by default.

3. Select the **Delete Note Reasons** tab.

4. Click the **Actions** menu of the delete note reason, and click **Edit**.

The **Edit Delete Note Reason** page opens.

5. Enter a unique reason that does not duplicate any existing reason in the library.

6. Click **Save** to update the delete note reason in the library.

The **Delete Note Reasons** list opens.

7. Use the **Show** and **Hide** actions to display the delete note reason to the care team or hide it from view.

- a. To hide the reason, from the Actions menu, select **Hide**.

- b. To show the reason, from the Actions menu, select **Show**.

8. To reorder the sequence of delete note reasons, click **Reorder**.

Drag and drop the delete note reasons to position them in your preferred order.

## Configuring note sharing with external systems

With the exception of private note types, you can configure note types to be shared with external systems.

You can configure a library of external system types to associate with note sharing options in the application.

A Virtual Private Network (VPN) is required for notes sharing. Contact IBM to provide the VPN.

For example, your organization might want to share notes with an External Medical Record (EMR) system outside of the organization. By default, the application comes with the following external system type: EMR. You can add and edit external systems.

## Adding external systems

By default, only one external system, *EMR*, comes with the product. You can add more external system types to the library to suit the needs of your organization.

The external systems that you configure become available to the care team to select when they share client notes.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Notes**.

The tabs in the **Notes** library contain a list of configurable types, external systems, and delete reasons. Types are displayed by default.

3. Select the **External Systems** tab.

4. Click **New**.

The **New External System Type** page opens.

5. Enter a unique name that does not duplicate any existing external system in the library.

6. Click **Save** to add the external system to the library.

The **External Systems Type** list opens.

7. Use the **Show** and **Hide** actions to display the external system type to the care team or hide it from view.

- a. To hide the type, from the Actions menu, select **Hide**.

- b. To show the type, from the Actions menu, select **Show**.

## Modifying external systems

You can update configured types of external systems to associate with note sharing options in the application. When you change the name of an external system in the library of configured systems, all existing instances in client records are updated.

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Care Planning > Notes**.

The tabs in the **Notes** library contain a list of configurable types, external systems, and delete reasons. Types are displayed by default.

3. Select the **External Systems** tab.

4. Click the **Actions** menu of the external system, and click **Edit**.

The **Edit External System** page opens.

5. Enter a unique name that does not duplicate any existing type in the library.

6. Click **Save** to update the external system in the library.

The **External Systems Type** list opens.

7. Use the **Show** and **Hide** actions to display the external system type to the care team or hide it from view.
  - a. To hide the type, from the Actions menu, select **Hide**.
  - b. To show the type, from the Actions menu, select **Show**.

## Configuring subscribers and managing subscriptions

Configure subscribers and manage their subscriptions so that external systems can receive notifications when data updates occur in Watson™ Care Manager. A subscriber represents an external system that Watson™ Care Manager notifies when the care team updates a client's information.

To see the option to configure subscribers, webhooks notifications must be turned on for your organization by Watson™ Care Manager. You must work with your IBM client executive to ensure that notifications are turned on. In addition, to receive notifications, certain information is required by Watson™ Care Manager to enable outbound flow of data to your external system. For more information, see [Required information for API flows \(on page 412\)](#).

When the care team updates a client's program status and an external system is subscribed to notifications for the Program data type, Watson™ Care Manager sends a notification to the external system about the update. Then, assuming the you can retrieve the latest version of the data so that users of the external system can view the updated program status.

After receiving a notification, you must retrieve the updates via a suitable API in the [Watson Care Manager REST API catalog \(on page 448\)](#) so that external system users who do not have access to Watson™ Care Manager, but are involved in the client's care, can see the latest information.

### Configuring subscribers

Configure a subscriber to register an external system for notifications. You can configure a library of subscribers. You can create, modify, and delete subscribers and create, modify, and delete their authentication details.

### Creating subscribers

You must create a subscriber so that Watson™ Care Manager can identify the external system to send notifications to.

Watson™ Care Manager combines the protocol, host, port and path values and uses them to generate the endpoint URL for the external system that receives the notifications.

Sleep window, error count window, and maximum error count values enable the circuit breaker system. Watson™ Care Manager initiates the circuit breaker if notifications fail because the external system is unavailable. If the number of notifications that you enter in the Maximum Error Count field fail in the number of milliseconds that you enter in the Error Count Window field, Watson™ Care Manager stops sending notifications. Watson™ Care Manager pauses communication with the external system for the number of milliseconds that you enter in the Sleep Window field.

**Note:**

In addition to you configuring the external system host and port values, your IBM client executive must also provide these values to Watson™ Care Manager for allowlist purposes. Otherwise, notifications will not be sent. For more information, see [Required information. \(on page 412\)](#)

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Integration > Subscribers**.

Existing subscribers are displayed.

3. Click **New**.

The **New Subscriber** page opens.

4. Enter the subscriber endpoint details.

- **Name** - Optional: Enter a name to easily identify the subscriber in Administration. For example, you might record a nickname for the subscriber.
- **Protocol** - Select the protocol that is used by the subscriber.
- **Host** - Enter the hostname of up to 200 characters.
- **Path** - Enter the path of up to 200 characters.
- **Port** - Enter the port number of up to 200 characters.
- **Sleep Window** - Enter the number of milliseconds that Watson™ Care Manager must wait before attempting to reconnect connect to the external system after the circuit breaker is initiated. You can enter up to 604800000 milliseconds (7 days). The recommended value range is 1800000 - 3600000 (30 - 60 minutes).
- **Error Count Window** - Enter the number of milliseconds during which notification failures can occur before Watson™ Care Manager determines that the external system is unavailable. You can enter up to 604800000 milliseconds (7 days) . The recommended value range is 600000 - 1200000 (10 - 20 minutes).
- **Maximum Error Count** - Enter the maximum number of consecutive notification failures that must occur within the milliseconds you enter in the Error Count Window before Watson™ Care Manager initiates the circuit breaker. You can enter up to 1000. The recommended value range is 3 - 5.

- **URI Headers** - Optional: Enter a comma-separated list of URI headers of up to 1000 characters.
- **URI Header Values** - Optional: Enter a comma-separated list of values for the URI headers of up to 1000 characters.

5. Click **Save**.

## Creating subscriber authentications

Add a subscriber's authentication details so that Watson™ Care Manager can authenticate with the external system when sending notifications in respect of its subscriptions.

Adding the subscriber authentication details enables Watson™ Care Manager to access the external system.

You can add only one authentication record for each subscriber.

If the subscriber's authentication type is OAuth (Open Authentication) 2, you must enter values for protocol, host, port, and path. If the subscriber's authentication type is Basic Authentication, these values are not required.



### Note:

If you choose the OAuth 2 authentication type, your IBM client executive must also provide the external system host and port values to Watson™ Care Manager for allowlist purposes. Otherwise, notifications will not be sent. For more information, see [Required information. \(on page 412\)](#)

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Integration > Subscribers**.

Existing subscribers are displayed.

3. Click a subscriber hostname.

The subscriber **Home** page opens.

4. Select **Add Subscriber Authentication** in the **Actions** menu.

The **Add Subscriber Authentication** page opens.

5. Add the subscriber authentication details.

- **Client Identifier** - Enter the external system's client identifier of up to 200 characters. The client identifier is the username that Watson™ Care Manager must use to authenticate with the external system.
- **Client Secret** - Enter the external system's client secret of up to 200 characters. The client secret is the password that Watson™ Care Manager must use to authenticate with the external system.
- **Authentication Type** - Select the authentication type that the external system uses.  
**Basic Authentication** type means that the external system requires a valid username and password to access it. **OAuth 2** means that the external system requires a valid username and password, and Watson™ Care Manager must access the external system authentication server to obtain a token. If the authentication type is OAuth 2, you must enter the external system authentication server details (protocol, host, path, and port).
- **Protocol** - Select the protocol that the external system authentication server uses.
- **Host** - Enter the hostname of the external system authentication server, of up to 200 characters.
- **Path** - Enter the path of the external system authentication server.
- **Port** - Enter the port number of the external system authentication server, of up to 200 characters.

6. Click **Save**.

## Modifying subscribers

If a subscriber's endpoint details change, you can update the subscriber. When you update a subscriber, Watson™ Care Manager sends notifications to the updated endpoint details.

Watson™ Care Manager combines the protocol, host, port and path values and uses them to generate the endpoint URL for the external system that receives the notifications.

Sleep window, error count window, and maximum error count values enable the circuit breaker system. Watson™ Care Manager initiates the circuit breaker if notifications fail because the external system is unavailable. If the number of notifications that you enter in the Maximum Error Count field fail within the number of milliseconds that you enter in the Error Count Window field, Watson Care Manager stops sending notifications. If this occurs, Watson™ Care Manager pauses communication with the external system for the number of milliseconds that you enter in the Sleep Window field.

**Note:**

If you modify the subscriber host or port values, your IBM client executive must also provide the updated values to Watson™ Care Manager for allowlist purposes. Otherwise, notifications will no longer be sent. For more information, see [Required information. \(on page 412\)](#)

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Integration > Subscribers**.

Existing subscribers are displayed.

3. Click a subscriber hostname.

The subscriber Home page opens.

4. Select **Edit Details** in the **Actions** menu.

The **Edit Subscriber** page opens.

5. Update the subscriber endpoint details.

- **Name** - Optional: Enter a name to easily identify the subscriber in Administration. For example, you might record a nickname for the subscriber.
- **Protocol** - Select the protocol that is used by the subscriber.
- **Host** - Enter the hostname of up to 200 characters.
- **Path** - Enter the path of up to 200 characters.
- **Port** - Enter the port number of up to 200 characters.
- **Sleep Window** - Enter the number of milliseconds that Watson™ Care Manager must wait before attempting to reconnect connect to the external system after the circuit breaker is initiated. You can enter up to 604800000 milliseconds (7 days). The recommended value range is 1800000 - 3600000 (30 - 60 minutes).
- **Error Count Window** - Enter the number of milliseconds during which notification failures can occur before Watson™ Care Manager determines that the external system is unavailable. You can enter up to 604800000 milliseconds (7 days). The recommended value range is 600000 - 1200000 (10 - 20 minutes).
- **Maximum Error Count** - Enter the maximum number of consecutive notification failures that must occur within the milliseconds you enter in the Error Count Window before Watson™ Care Manager initiates the circuit breaker. You can enter up to 1000. The recommended value range is 3 - 5.
- **URI Headers** - Optional: Enter a comma-separated list of URI headers of up to 1000 characters.
- **URI Header Values** - Optional: Enter a comma-separated list of values for the URI headers of up to 1000 characters.

6. Click **Save**.

## Modifying subscriber authentications

You can update the subscriber's authentication details if the subscriber client identifier or authentication type changes.

If the subscriber's authentication type is OAuth (Open Authentication) 2, you must enter values for protocol, host, port, and path. If the subscriber's authentication type is Basic Authentication, these values are not required.

**Note:**

If you update the external system authentication server host or port values, your IBM client executive must also provide the updated values to Watson™ Care Manager for allowlist purposes. Otherwise, notifications will no longer be sent. For more information, see [Required information \(on page 412\)](#).

1. Sign in with your administrator credentials.

Your home page opens.

2. Click **Integration > Subscribers**.

Existing subscribers are displayed.

3. Click a subscriber hostname.

The subscriber **Home** page opens.

4. From the row **Actions** menu for an authentication, click **Edit**.

The **Modify Authentication** page opens.

5. Add the subscriber authentication details.

- **Client Identifier** - Enter the external system's client identifier of up to 200 characters. The client identifier is the username that Watson™ Care Manager must use to authenticate with the external system.
- **Authentication Type** - Select the authentication type that the external system uses. **Basic Authentication** means that the external system requires a valid username and password to access it. **OAuth 2** means that the external system requires a valid username and password, and Watson™ Care Manager must access the external system authentication server to obtain a token. If the authentication type is OAuth 2, you must enter the external system authentication server details (protocol, host, path, and port).
- **Protocol** - Select the protocol that the external system authentication server uses.
- **Host** - Enter the hostname of the external system authentication server, of up to 200 characters.

- **Path** - Enter the path of the external system authentication server.
  - **Port** - Enter the port number of the external system authentication server, of up to 200 characters.
6. Click **Save**.

## Modifying subscriber client secrets

If a subscriber's client secret changes, you can update it so that Watson™ Care Manager uses a valid client secret when accessing the external system.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Integration > Subscribers**.  
Existing subscribers are displayed.
3. Click a subscriber hostname.  
The subscriber **Home** page opens.
4. From the row **Actions** menu for an authentication, click **Update Client Secret**.  
The **Update Client Secret** page opens.
5. Enter the external system's client secret of up to 200 characters.
6. Click **Save**.

## Deleting subscribers

If a subscriber is obsolete or was created in error, you can delete it. When you delete a subscriber, Watson™ Care Manager stops sending notifications to the subscriber in respect of their subscriptions (if configured).

Deleting a subscriber deletes the subscriber, their authentications, and unsubscribes them from notifications relating to their active subscriptions.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Integration > Subscribers**.  
Existing subscribers are displayed.
3. From the row **Actions** menu for a subscriber, click **Delete**.  
The **Delete Subscriber** page opens.
4. Confirm that you want to delete the subscriber by clicking **Delete**.

## Deleting subscriber authentications

If a subscriber authentication is obsolete or was created in error, you can delete it.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Integration > Subscribers**.  
Existing subscribers are displayed.
3. Click a subscriber hostname.  
The subscriber Home page opens.
4. From the row **Actions** menu for a subscriber authentication, click **Delete**.  
The **Delete Subscriber Authentication** page opens.
5. Confirm that you want to delete the subscriber authentication by clicking **Delete**.

## Managing subscriptions

Manage subscriptions so that a subscriber can receive notifications about updates to specific data types. You can subscribe and unsubscribe from notifications.

### Subscribing to notifications

Subscribe to notifications about data type updates when they occur in Watson™ Care Manager.

You can add multiple subscriptions for a subscriber. However, for each subscriber, you can add only one subscription per data type. The option to select an external system reference is displayed only when you choose a client data subscription.



#### Note:

Under data privacy regulations, you are automatically subscribed to client status data notifications in Watson™ Care Manager when you create a subscriber. This subscription notifies you about client deletions in Watson™ Care Manager, so that you can take any required actions to delete the client from other systems. You cannot unsubscribe from client status data notifications.

You can subscribe to notifications for configurable client data types only. An example is a custom Family History client data type that your organization configures to capture a client's family history information. You cannot subscribe to notifications about updates to non-configurable client data types, for example, Address, Phone Number, and Email Address.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Integration > Subscribers**.  
Existing subscribers are displayed.
3. Click a subscriber hostname.  
The subscriber **Home** page opens.
4. Select **Add Subscription** in the **Actions** menu.  
The **Add Subscription** page opens.
5. Choose which data type you want receive notifications about.
6. If you selected **Client Data**, select the external system reference that uniquely identifies a specific configurable client data type.
7. Click **Save**.

When the care team creates, updates, or deletes client information in respect of the data type, Watson™ Care Manager sends a notification to the subscriber. Review the notification message to determine whether to retrieve the data updates by using a suitable API in the [Watson Care Manager REST API catalog \(on page 448\)](#).

[Reviewing the notification message \(on page 446\)](#)

[Retrieving data updates \(on page 448\)](#)

## Unsubscribing from notifications

If you want Watson™ Care Manager to stop sending notifications in respect of data type updates, you can unsubscribe from the notifications.

By unsubscribing, Watson™ Care Manager cancels the subscription and no longer sends notifications when the care team updates client information in respect of the data type.

When you create a subscriber, Watson™ Care Manager automatically subscribes the external system to notifications when a client is deleted in Watson™ Care Manager. You cannot unsubscribe from client deletion notifications.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Integration > Subscribers**.  
Existing subscribers are displayed.
3. Click a subscriber hostname.  
The subscriber **Home** page opens. Existing subscriptions are displayed.

4. From the row **Actions** menu for a subscription, click **Unsubscribe** for the relevant data type.  
The **Unsubscribe** page opens.
5. Click **Confirm** to confirm that you want to unsubscribe from notifications for the data type.

## Configuring external referral recipients

Configure a library of intended recipients of an external referral for the care team to choose when they send a client referral to an external party (via an API). You can edit an external referral recipient after you create it. You can configure whether an external referral recipient is made available to the care team to select when they send the referral.

### Creating external referral recipients

You can create a library of intended recipients for a client referral to make available for use by care teams when they send the referral to an external party (via an API).

A configured external referral record represents a recipient to route an external client referral to. For example, an external system, group, or organization.

By default, newly-created external referral recipients are configured to be **Shown**. However, to make the recipient available to care teams, and for Watson™ Care Manager to notify the external system about the client referral, ensure that you subscribe to notifications about the External Referral data type by [Subscribing to notifications \(on page 286\)](#).

You can associate an external system reference with the external referral recipient value that you are adding. When receiving the external referral recipient as an API attribute, the external system identifies the recipient by its external system reference.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Integration > External Referrals**.  
Existing external referrals are displayed.
3. Click **New**.  
The **New External Referral** page opens.
4. In the **External Referral To** field, enter a unique external recipient name of up to 200 characters.
5. **Optional:** In the **External System Reference** field, enter a unique reference number of up to 20 alphanumeric characters.
6. Click **Save** to add the external referral recipient to the library. The External Referrals list opens.
7. Use the **Show** and **Hide** actions to display the external referral recipient to the care team or hide it from view.

- To hide the external referral recipient, from the Actions menu, select **Hide**.
  - To show the external referral recipient, from the Actions menu, select **Show**.
8. To reorder the sequence of external referral recipients, click **Reorder**. Drag and drop the reasons to position them in your preferred order.

## Modifying external referral recipients

In the library of configured external referrals, you can update an external referral recipient for the care team to choose when they send a client referral to an external party (via an API). You can configure the library to show or hide specific external referral recipients. You can reorder the recipients so that the most relevant ones display first according to your organization's needs.

You can update the external referral recipient name and if not previously configured, you can associate a new external system reference with the external referral recipient name. When receiving an external referral recipient as an API attribute, the external system identifies it by its external system reference. If you update an existing external system reference that was previously configured and is already in use in existing integrations, you might cause existing integrations to fail.

1. Sign in with your administrator credentials.  
Your home page opens.
2. Click **Integration > External Referrals**.  
Existing external referrals are displayed.
3. From the Actions menu for an external referral, click **Edit**.  
The **Edit External Referral** page opens.
4. In the **External Referral To** field, update the external recipient name.
5. **Optional:** In the **External System Reference** field, enter a unique reference number of up to 20 alphanumeric characters.
6. Click **Save**.
7. Use the **Show** and **Hide** actions to display the external referral recipient to the care team or hide it from view.
  - To hide the external referral recipient, from the Actions menu, select **Hide**.
  - To show the external referral recipient, from the Actions menu, select **Show**.
8. To reorder the sequence of external referral recipients, click **Reorder**. Drag and drop the reasons to position them in your preferred order.

## Configuring the PDF footer

Configure the footer text that displays on PDF documents downloaded from the application so that it is more relevant to your organization. You can view, add and edit the footer text in the downloaded PDFs. You cannot edit the Disclaimer text.

### Updating the PDF footer text

You can edit the footer text that displays on downloaded PDF documents in the application. You cannot edit the Disclaimer text.

The updated PDF Footer text is displayed on all PDF documents generated within the application.

1. Sign in with your administrator credentials. Your home page opens.
2. Click **Care Planning > PDF Footer**.  
The PDF Footer page open and displays default text.
3. Update the PDF Footer text up to a maximum of 300 characters.
4. Click **Save** to save changes and return to the PDF Footer home page.
5. Click **Cancel** to return to the PDF Footer home page.

# Chapter 2. Engaging clients in their own care

Encourage your clients to use the IBM Watson® Care Manager Connect Individuals web application, which is linked to IBM Watson® Care Manager, to collaborate with you and the rest of their care team on their care plan. Clients can sign in to Connect Individuals to see their planned goals and actions, complete their actions, and send messages to their care team. If their service providers are registered in IBM Watson® Care Manager, clients can also collaborate with their care team on provider services on their plans.

## The Connect Individuals application

Clients can use Connect Individuals to see the goals and actions on their plans, and to complete actions. If the Messaging feature is enabled in Watson™ Care Manager, clients and care teams can send messages to each other. If service providers are registered in Watson™ Care Manager and the Providers feature is enabled by an administrator in Watson™ Care Manager, clients can see the provider services on their plan, and search for local services and providers. They can shortlist their preferred service providers to review with their care team. If your organization uses Watson™ Care Manager Community Service Payment to manage budgets and payments and if clients are required to contribute to the cost of their care services, they can set up their payment contributions using PayPal. Connect Individuals is a responsive web application that you access from the Internet.

Care teams can plan goals, actions, and provider services for clients in Watson™ Care Manager and clients can see them in Connect Individuals.

### The Connect Individuals home page

#### **Actions**

The client's open actions are listed. Clients can select an action to see its details, mark an action as completed, or open a list of their closed actions.

#### **Goals**

The client's open goals are shown on cards. Clients can select a goal to see the associated actions, or open a list of their closed goals.

#### **Services**

If the Providers feature is enabled in Watson™ Care Manager, the provider services on the client's plan are shown on cards. If the service already has a provider, the provider's name, and the service start date, units, and frequency are shown where available. Clients can select a service to see more details. Clients can search the available services and providers

and shortlist their preferred provider services to discuss with their care team. Care teams can add agreed services to the client's plan.

A shortlist card shows clients how many services are currently shortlisted, if any.

### Care team

The client's care team members and their phone numbers are listed.

### Payments

Clients can make payment contributions towards the cost of their services using PayPal. Using Connect, the client can grant permissions to allow payments to be made from their PayPal account to the organization. If the client does not have a PayPal account, when they set up payments in Connect, they will be prompted to create one and guided through the process.



#### Note:

Clients must create and use a personal PayPal account and not a business account.

Payments from the client start when the client's budget is approved and services authorized.



#### Note:

The **Payments** page displays only if the administrator has configured one budget contributor to be the client contributor.

## The Messages page

If the messaging with the Connect Individuals application feature is enabled in Watson™ Care Manager, clients and their care teams can send and receive messages about the client's care. The client can see the messages in Connect Individuals, and the care team can see the messages in Watson™ Care Manager.

## The Find Services page

If the Providers feature is enabled in Watson™ Care Manager, clients can search all of the available services by service name, and filter their search by keyword and distance. Clients can add their preferred provider services to their shortlist for the care team to discuss with the care team.

## The Shortlist page

Clients and their care teams can shortlist services that might be of interest to the client for later discussion. The shortlist shows the services and the person who shortlisted them. The client can see the shortlist in Connect Individuals, and the care team can see the shortlist in Watson™ Care Manager.

## Inviting clients to register for Connect Individuals

Invite your clients to register to use the Connect Individuals application to collaborate with you on planning their goals, actions, and community services. Clients receive an email with instructions on how to register.

Before you can invite a client, a date of birth and an email address must be registered for the client in IBM Watson® Care Manager.

1. Sign in to your account.

Your home page opens.

2. To see your clients, from the **Side Navigation Menu**, select **Clients > My Clients**, or search for other clients.

By changing the filters on **My Clients** page, you can change your client list view. For example you can apply a filter to view only your High Priority clients. Click **Add Filter** to add a filter and further refine your client list view by Name, Date of Birth, Priority, Programs, or Phone Number. When you filter by Name, you can search by Last Name, First Name to return a client record that exactly matches that name. If you do not know the exact details to search for, you can complete a partial search by entering one or more characters in the client's name. In this case, the search results might return multiple name records that contains the partial string or character that you entered. Special characters are supported in name searching, for example, you can search for the last name of O'Neill. Note that searching for O'Neill will return O'Neill name records but a search for O' Neill (with a space) will not return O'Neill name records.

3. Click a client name.

Their **Summary** view opens.

4. Click **History > Connect**.

The Connect page opens and displays the email address that is linked to the client's Connect Individuals account and the account status. If the client is not yet invited to register with Connect Individuals, no information is displayed.

5. From the **Actions** menu, select **Send Onboarding Request**.

The **Send Onboarding Request** page opens.

6. Select the client's email address and click **Send** to send the client an email with instructions on how to register for the Connect Individuals application.

## Collaborating with your care team

As a client, you can use the Connect Individuals web application (if licensed) to securely collaborate with your care team on your care plan. You can access the application from your browser on the Internet. You can see and send messages to your care team, see your goals and actions, complete actions, and see your care team's contact information. If you use provider services, you can see the service on your plan, and can search for and shortlist your preferred services and providers to review with your care team.

### Registering and signing in to Connect Individuals

Your care team discusses your health goals with you and invites you to use Connect Individuals. You receive an email with instructions on how to sign up for Connect Individuals and set a password. After you set your password, you can sign in to the application.

When you are entering your date of birth as part of the registration process, the date of birth format is taken from your browser's locale settings.

By default, if you are inactive for 30 minutes, you will be signed out of your account. You can sign in again to continue working.

If you forget your password, you can reset it from the sign in page. By default, you can reset your password once per hour.

The inactivity and password reset periods are determined by your care team's organization and might be different for you.

1. Open the application in a browser window.



**Tip:**

You can find the application link in your welcome email.

2. The IBM Watson Health sign-in page opens. If your care organization's Watson™ Care Manager application is integrated with a third-party identity provider external to IBM, you see an option to **Log in with identity provider**. Ignore this option as it does not apply to your access to Connect Individuals.
3. Enter your email address and password and click **Sign in**. Your home page opens.

4. To sign out, select **your name > Sign out**.

To protect your privacy, ensure that you sign out when you are finished. After you sign out, no one else can see your personal information, even if they start the application on your device.

## Viewing your messages

Your care team can send you messages about your plan that you can view in Connect. You receive an email to notify you about each new message.

View your messages by opening the **View message** link in the email or sign in to Connect at any time to see your messages.



**Note:**

Your Messages page does not refresh in real-time. You can also see new messages by refreshing your browser, sending a new message, or navigating away from your messages and returning to them.

If you have new messages, the number of new messages is displayed on the Messages menu option.

Your history of sent and received messages is shown in a single thread. The order of the messages shown is oldest to latest. You cannot delete messages from your messages thread. Unread messages from your care team are shown in the **Unread messages** section of your messages thread.



**Note:**

If you have unread messages, no additional email notifications about new messages are sent. Email notifications will resume when you read your messages. We advise you to regularly check your messages so that you do not miss important communications from your care team. You can turn off email notifications at any time in your account settings.

1. Do one of the following.

- View your messages from an email notification.
  - a. In the email that you receive, click **View message**. The email subject is **New message from your care team**.
  - b. The application opens in a browser window.
  - c. If you are not already signed in, enter your username and password to sign in, then select **Messages** from the menu. Your Messages page opens
  - d. If you are already signed in, your Messages page opens when you click **View message** in the email. Existing messages are shown in your messages thread.

- View your messages when you sign in.
- a. Open the application in a browser window.
  - b. Enter your username and password.
- Your home page opens.
- c. Select **Messages** from the menu. Existing messages are shown in your Messages thread.

2. To see new messages, go to the **Unread messages** section of your Messages thread.

If the message is from your care team, you see the details of the care team member who sent the message and the message details.

## Sending messages to your care team

If you need to contact your care team, or have questions or issues regarding your plan, you can send them a message.

When you open your Messages page, you are presented with a disclaimer and a link to the [Terms of use \(on page\)](#) for messaging. Review them so that you can abide by the terms when you use the messaging feature. You can collapse the disclaimer to hide it from view and expand it to reveal the disclaimer again, if needed.

All members of your care team can see your sent messages. Do not use messaging for urgent matters. In a medical emergency, call your care provider.



### Note:

You can optionally attach a file to a message. Most file attachment types are supported, but for security reasons, you cannot attach certain file types. For more information, see [Attachment restrictions \(on page\)](#). You can attach only a single file to a message. You can send an attachment without a message, if needed. File attachment names must not exceed 250 characters. The file attachment size must not exceed 25 MB. Watson™ Care Manager scans the selected file to ensure that viruses and malware do not enter the system by mistake. If a file is potentially harmful, you cannot attach it to the message.

1. Open the application in a browser window.
  2. Select **Messages** from the menu.
- The Messages page opens.
3. Enter your message in the message field. You can enter up to 4000 characters.

4. Optional: Browse to the file attachment that you want to send by clicking the attachment  icon and select it.
5. Click the send icon  to send the message to your care team.  
Your sent message is displayed in your Messages thread.

## Setting up payments

You might be required to contribute to the cost of your care services. Your care organization may use Connect to collect your contribution. You can make your contribution using PayPal.

If you are required to contribute, your care team will discuss how much you are required to pay. Payments from your account begin when your budget is approved and your services are authorized.



**Note:**

You must use a personal PayPal account and not a business account.

1. If you are required to set up Payments, when you sign into Connect, a message will alert you that you need to set up Payments. Click the link in the message to open the **Payments** page.
2. Click the PayPal button,  
PayPal guides you through the process and gives you the option to log into your existing account or sign up for a new account. Clients must create and use a personal PayPal account and not a business account.

When you complete the PayPal process, you are returned to the Connect **Payments** page. Your account name and the date you signed up to make payments with that account display.

When you are no longer required to make payment contributions towards the cost of your services, you can remove your PayPal account information from Connect using the **Remove** link on the **Payments** page. Note: If you remove your account when you are still required to make contributions, your payments will not be processed and your services may be affected.

## Viewing your next payment

If you are required to contribute to the cost of your care, you can view the amount that you have to make for your next contribution so that you can ensure that you have sufficient funds available in your account to cover the cost.

If you are required to contribute, your care team will discuss how much you are required to pay.



**Note:**

Contribution payments from your account only begin when your budget is approved and your services are authorized.

1. Go to the **Payments** page to view the details of your next contribution payment.
2. To view the services that require your contribution, click the **Services** link.

## Viewing and completing your actions

You can see all of the actions on your plan. As you finish actions, you can complete them so you and your care team can track your progress. You can also see all of the actions that are associated with a goal by looking at the goal.

Completing actions cannot be undone. If you complete an action by mistake, you can ask your care team to add the action to your plan again.

1. Go to the **Actions** section on the home page to see a list of your open actions.
2. Click an action to see its details. To close this view, click **Back**.
3. When you finish an action, complete the action by selecting the action check box.
4. Select **See completed actions** to see actions that you previously completed.
5. You can also select a goal card to see all the actions for a goal.

All open and completed actions for that goal are displayed. To close this view, click **Back**.

## Viewing your goals

You can see all of the goals on your plan and see the actions that are associated with a goal.

1. Go to the **Goals** section of the home page to see your open goals displayed in cards, one card per goal.
2. Select a goal card to see all the actions for a goal.  
All open and completed actions for that goal are displayed. To close this view, click **Back**.
3. Select **See completed goals** to see goals that you previously completed.

## Viewing your care team

Go to the **Care Team** section of the home page to see your care team members and their phone numbers. If your device can make calls, select the phone number to call the care team member.

## Viewing your services

If you are using provider services, you can see all of the services on your plan in the **Services** section of the home page. The number of shortlisted services is also shown on a card.

1. Go to the **Services** section of the home page to see the currently open services on your plan that is displayed in cards, one card per service.  
If the service has a provider, you see the provider name, and the service start date, units, and frequency.
2. If a service has a provider, you can select the service to see more information on the service page.  
You can see the service description, locations, rates, available languages. You can also see the service provider's contacts and the provider's description.

## Searching for providers for services on your plan

If you are using provider services, you can search for providers for the services on your plan. Search the available providers and shortlist your preferred providers. Review the shortlisted providers and discuss them with your care team, who can add them to your plan.

1. Go to the **Services** section of the home page.  
The currently open services on your plan are shown.
2. Select **See Providers** to search for providers of that service.  
All of the providers for that service are shown in the search results.
3. **Optional:** To refine your search, enter up to 7 keywords, an address, or a post code.  
The keyword search is based on the provider name, provider description, provider service description, the service name, and the service description.
4. Select a service from the search results to see the full provider and service details.
5. To shortlist a provider service, select the shortlist icon .  
The service is shortlisted.

## Searching for and shortlisting services

If you are using provider services, you and your care team can shortlist provider services to review for addition to your plan. Search the available services and shortlist your preferred services. Review the shortlisted services and discuss them with your care team, who can add them to your plan.

You can search the available services by using the service name and keywords, and refine your search by location. You can access more information about the service and provider from your search results, and see whether the service is already on your shortlist.

1. Select **Find Services** from the menu.  
The services search page opens.
2. Select a single service, or enter up to 7 keywords, or both, and if needed, enter an address or a post code to refine your search.  
The keyword search is based on the provider name, provider description, provider service description, the service name, and the service description.
3. Select a provider service in your results to see more information.
4. To shortlist a service, select the shortlist icon  to add the provider to your shortlist.

## Setting your preferences

If you no longer want to receive emails about new messages from your care team, you can turn the notifications off. You can turn them back on at any time. If you do not want to use Connect, you can close your account.

By default, email notifications about new messages are turned on. Your preferences are applied immediately to your account.

1. Select **Account settings** from the menu.
2. Choose an option.
  - a. To close your account, click **Close account**.
  - b. To turn on or off email notifications about new messages, check or uncheck the **New messages** check box.

## Managing Connect Individuals client accounts

If a client no longer needs access to Connect Individuals, you can temporarily suspend their account and reactivate it later. If the client is unlikely to need access to Connect Individuals again, you can close their account which deactivates it in the application. If you close an account and the client needs access to Connect Individuals again, you must send the client a new onboarding request.

### Suspending Connect Individuals accounts

If a client no longer needs access to Connect Individuals on a temporary basis, for example, because they are hospitalized, you can suspend their account in IBM Watson® Care Manager.

You can suspend only active client accounts. The client's account is otherwise unaffected and is still associated with goals, actions, and services. You can reactivate a suspended account at any time without needing to re-onboard the client.

1. Sign in to your account.  
Your home page opens.
2. To see your clients, from the **Side Navigation Menu**, select **Clients > My Clients**, or search for other clients.
3. Click a client name.  
Their **Summary** view opens.
4. Select **History > Connect**. The **Connect** page opens and displays the email address that is linked to the client's Connect Individuals account and the current status of their account.
5. From the **Actions** menu, select **Suspend Account** and confirm by clicking **Suspend Account** again.  
The status of the client's account changes to **Suspended**.

## Reactivating Connect Individuals accounts

You can reactivate a suspended Connect Individuals client's account to enable the client to access Connect Individuals again with their onboarding details.

You can reactivate only suspended client's accounts.

1. Sign in to your account.  
Your home page opens.
2. To see your clients, from the **Side Navigation Menu**, select **Clients > My Clients**, or search for other clients.
3. Click a client name.  
Their **Summary** view opens.
4. Select **History > Connect**. The **Connect** page opens and displays the email address that is linked to the client's Connect Individuals account and the current status of their account.
5. From the **Actions** menu, select **Reactivate Account** and confirm by clicking **Reactivate Account** again. The status of the client's account changes and is displayed as **Active** again.

## Closing Connect Individuals accounts

When a client no longer needs access to the IBM Watson® Care Manager Connect Individuals application, you can close their Connect Individuals account in IBM Watson® Care Manager. Clients can no longer access the application to see their information. If your organization uses Watson™ Care Manager Community Service Payment, and the client has a billing agreement in place then the billing agreement is canceled when you close the Connect Individuals account.

If clients want to access their information in Connect Individuals after you close the account, you must create their Connect Individuals account again. Clients are sent a new welcome email.



**Note:**

If a client has a billing agreement in place for the automatic processing of any contributions the client is required to make towards services, then the billing agreement is canceled when the Connect Individuals account is closed and no further contributions are processed. If contribution issues arise when you close an account, you can resolve the issues by onboarding the client again so that a new billing agreement can be created and outstanding contributions processed.

If the messaging feature is enabled, the care team cannot send messages to the client when their account is closed as the client can no longer access Connect to respond. However, the care team can continue to see the client's prior message history.

1. Sign in to your account.  
Your home page opens.
2. To see your clients, from the **Side Navigation Menu**, select **Clients > My Clients**, or search for other clients.
3. Click a client name.  
Their **Summary** view opens.
4. Select **History > Connect**. The **Connect** page opens and displays the email address that is linked to the client's Connect Individuals account and the current status of their account.
5. From the **Actions** menu, select **Close Account** and confirm by clicking **Close Account** again.

# Chapter 3. Managing client messages

Your clients can send you, and all other members of their care team, messages about their care. A client can send messages either from the Connect Individuals application or their external portal, but not both. For more information on the Connect Individuals application, see [The Connect Individuals application \(on page 291\)](#). If you have unread messages from your clients, Watson™ Care Manager notifies you. You can manage your message notifications, send new messages to clients, and filter the list of messages between a single client and their care team.

## Managing message notifications

Manage your message notifications so that you do not miss important communications from your clients. You can filter your message notifications, mark notifications as read, and clear notifications to tidy up your notifications list view.

Each notification relates to a message from a single client. Starting with the most recently received notification, the list shows notifications about messages from all of your clients. You can quickly see which messages require a response and manage your message notifications list accordingly.



### Note:

The message notifications list displays message notifications that are associated with only those clients who are assigned to you and you are a member of their care team.

## Filtering your message notifications list view

You can filter your list of notifications about messages from your clients. For example, you can filter the list to show only unread notifications.

Starting with the most recent, your message notifications list view shows all notifications by default. You can see the details of the client who sent the most recent message, a preview of the most recent message, and other message details.

By applying one or more of the predefined filters, you can filter the list to display only notifications that you want to see.

1. Sign in to your account.  
Your home page opens.
2. From the **Side Navigation menu**, click **Message Notifications**. Alternatively, if you have unread messages from your clients, a notification is shown on your home page that shows the number of unread messages. Click **Message Notifications** in the notification.

The **Message Notifications** page opens.

3. Filter the message notifications list by selecting one or more of the following predefined filters.
  - **Read**
  - **Unread**



**Note:**

By default, the predefined filters are displayed on the **Message Notifications** page. You can click the filter icon to see or hide the filters.

Your chosen filters are immediately applied to the message notifications list. You can remove your applied page filters by clicking **Reset** at any time.

## Marking message notifications as read

If you have read one or more notifications, you can mark them as read. For example, you might mark a notification as read because you actioned a response to it or to distinguish it from other unread notifications on your list.

Marking one or more notifications as read only marks them as read on your list of notifications. Other care team members' message notifications lists are unaffected.

You can mark a single notification as read or mark multiple notifications as read at a time. Marking notifications as read does not remove them from your message notifications list. To remove notifications from your list, you must clear them. For more information see, [Clearing message notifications \(on page 305\)](#).



**Note:**

To see the full message, click the notification or the name of the client who is associated with that notification. If you click the notification or the client's name, Watson™ Care Manager automatically marks the notification as read.

1. Sign in to your account.  
Your home page opens.
2. From the **Side Navigation Menu**, click **Message Notifications**. Alternatively, if you have unread messages from your clients, a notification is displayed on your home page that shows the number of unread messages. Click **Message Notifications** in the notification.  
The **Message Notifications** page opens.
3. Mark a single notification as read or mark multiple notifications as read at a time in bulk.

- To mark a single notification as read, click the **Actions** menu of the notification and click **Mark as Read**.
- To mark multiple notifications as read, select the checkbox next to one or more client names and click **Mark as Read**.

The **Mark as Read** dialog box opens.

4. Click **Mark as Read** to mark the notifications as read.

## Clearing message notifications

You can clear one or more notifications to remove them from your message notifications list. For example, you might want to clear a notification that you know you do not need to action because another care team member is dealing with it.

Clearing one or more notifications removes the notifications only from your message notifications list. Messages that are associated with those notifications remain visible on the client's messages list. Other care team members' message notifications lists are unaffected.

1. Sign in to your account.  
Your home page opens.
2. From the **Side Navigation Menu**, click **Message Notifications**. Alternatively, if you have unread messages from your clients, a notification is displayed on your home page that shows the number of unread messages. Click **Message Notifications** in the notification.  
The **Message Notifications** page opens.
3. Clear a single notification or clear multiple notifications at a time in bulk.
  - To clear a single notification, click the **Actions** menu of the notification and click **Clear**.
  - To clear multiple notifications, select the checkbox next to one or more client names and click **Clear**.  
The **Clear** dialog box opens.
4. Click **Clear** to remove the notifications from your message notifications list.

## Sending messages to clients

You can send messages to clients about their care by using the messaging with the Connect Individuals application feature or the external messaging feature.

If your administrator has enabled messaging with the Connect Individuals application for your organization, you can send messages to your client if the client has an active Connect account. The client can see and reply to your messages from their Connect application.

If your administrator has enabled external messaging for your organization, you can send messages to your client, which are sent and received through the external messaging API. The client can see and reply to your messages from their external portal.

When you open the messages list, you are presented with a disclaimer and a link to the [Terms of use](#) for messaging. Review them so that you can abide by the terms when you use the messaging with the Connect Individuals application feature or the external messaging feature. All members of the client's care team can see all messages, sent or received.



**Note:**

You can send messages to only those clients who are assigned to you and you are their care team member.

Depending on what feature your administrator has enabled for your organization, you can either use the messaging with the Connect Individuals application feature or the external messaging feature to send messages to a client. You cannot use both messaging with Connect Individuals and external messaging at the same time.

1. Sign in to your account.

Your home page opens.

2. To see your clients, from the **Side Navigation Menu**, select **Clients > My Clients**, or search for other clients.

3. Click a client name.

Their **Summary** view opens.

4. Click **Messages**.

The **Messages** page opens. All existing messages between the client and the care team are displayed.

5. Click **New Message**.

The **New Message** dialog box opens.



**Note:**

If your administrator has enabled the messaging with the Connect Individuals application feature, and if a client is deactivated or their Connect Individuals account is closed, the action to send a new message to the client is disabled as they can no longer access their Connect account to respond.



If your administrator has enabled the external messaging feature, the action to send a new message is available to you for all of your active clients, as messages are sent and received through the external messaging API and not through the Connect account.

6. Enter a message of up to 4000 characters.
7. Browse to the file attachment that you want to upload and select it.



**Note:**

Most file attachment types are supported, but for security reasons, you cannot attach certain file types. For more information, see [Attachment restrictions \(on page ▶\)](#). You can attach only a single file to a message and you can send an attachment without a message if needed. File attachment names must not exceed 250 characters. The file attachment size must not exceed 25 MB. Watson™ Care Manager scans the selected file to ensure that viruses and malware do not enter the system by mistake. If a file is potentially harmful, you cannot attach it to the message.

8. Click **Send** to send the message to your client.

The client will receive an email to notify them about the new message or they can see your message at any time by signing in to their Connect account. Alternatively, if the client is using external messaging, they can see your message in their external portal.

## Filtering the client messages list view

You can filter the list of messages that are sent between the care team and a single client.

If your administrator has enabled the messaging with the Connect Individuals application feature, the list of messages shows the following:

- All messages sent by the client to the care team from the Connect Individuals application.
- All messages sent by the care team to the client from Watson™ Care Manager.

If your administrator has enabled the external messaging feature, the list of messages shows the following:

- All messages sent by the client to the care team from their external portal.
- All messages sent by the care team to the client from Watson™ Care Manager.

Starting with the most recent, the list shows all messages that are sent and received. You can see the details of the sender (you, the client, or a care team member) and the message details.

By applying one or more of the predefined page filters, you can filter the list to display only messages that you want to see. For example, you can filter the list to show only those messages that you sent to the client.

1. Sign in to your account.

Your home page opens.

2. To see your clients, from the **Side Navigation Menu**, select **Clients > My Clients**, or search for other clients.

3. Click a client name.

Their **Summary** view opens.

4. Click **Messages**.

The **Messages** page opens.

5. Filter the messages list based on specific filter criteria.

- **Sent By** : All messages sent by you, the client, or a care team member.
- **Sent On**: All messages sent during the specified date range.



**Note:**

You cannot filter by a specific date.

6. Click **Apply** to apply the filter.

You can remove your applied page filters by clicking **Reset** at any time.

# Chapter 4. Integrating

As an integrator, use the Watson™ Care Manager REST APIs to integrate third-party applications with Watson™ Care Manager so that data can be shared between the applications. For security and user authentication purposes, if an identity provider external to IBM stores your organization's user accounts, you can request that Watson™ Care Manager integrate with that identity provider.

You can integrate Watson™ Care Manager with other IBM systems, or third-party applications, such as an electronic medical record (EMR) application through REST APIs. When Watson™ Care Manager is integrated with other applications, Watson™ Care Manager can receive data from those applications through APIs. For example, Watson™ Care Manager can receive client data that is captured in another application so that the latest client information is available in all applications.

**Note:** The option to integrate Watson™ Care Manager with your organization's identity provider optionally involves the use of REST APIs. Third-party identity provider integration relates to the authentication of users when they access Watson™ Care Manager.

## Watson™ Care Manager data and integrated systems

The information that is recorded and maintained for a client in Watson™ Care Manager can be manually captured or it might come from integrated systems through APIs.



### Remember:

Watson™ Care Manager data can be received from other IBM systems, such as IBM Phytel applications or third-party applications, such as an EMR system.

Client referrals can be manually created or received from integrated systems. Client contact, demographics, clinical, and vitals data can be manually created, or it can be received from integrated systems when clients are registered. Notes and alerts can be manually added, or they can come from third-party applications. Assessments can be manually run for registered clients, or they can come from third-party applications.



### Note:

All date/time attributes received by the API process are stored in the GMT timezone. An offset timezone is applied based on the care team member's preference when the date/time attributes display in Watson™ Care Manager.

## Data summary

The table summarizes the data that can be manually captured in Watson™ Care Manager, and which integrated systems can send and update each type of data.

For Clinical and Vitals data, you can see whether manual data capture is supported by a terminology search or a drop-down coded list of values that you select from. With terminology search, when you search for the data by name, Watson™ Care Manager searches a coded list of values and you select from your results. When capturing other data, you select from a drop-down list of coded values without searching.



**Note:**

Coded lists are preconfigured by Watson™ Care Manager and cannot be configured by Administrators.

Where data capture is supported by a terminology search or a drop-down coded list, the table shows the coding system that Watson™ Care Manager uses.

Category	Data	Manual data capture	Received	Updated	Terminology search/drop-down coded list
Contact	Address	✓	Phytel, third-party applications	Third-party applications	Not applicable
	Contact Preferences	✓	✗	✗	Not applicable
	Email Address	✓	Phytel, third-party applications	Third-party applications	Not applicable
	Phone Number	✓	Phytel, third-party applications	Third-party applications	Not applicable
	Social Network Contact	✓	✗	✗	Not applicable

Category	Data	Manual data capture	Received	Updated	Terminology search/drop-down coded list
<b>Demographics</b>	Birth and Death	✓	Phytel, third-party applications	Third-party applications	Not applicable
	Marital Status	✓	Third-party applications	Third-party applications	
	Gender	✓	Phytel, third-party applications	Third-party applications	Not applicable
	Identification	✓	Phytel, third-party applications	Third-party applications	Not applicable
	Marital Status	✓	Phytel, third-party applications	Third-party applications	Not applicable
	Name	✓	Phytel, third-party applications	Third-party applications	Not applicable
	Tag	✓	Third-party applications	Third-party applications	Not applicable
<b>Background</b>	Health Background	✓	✗	✗	Not applicable
	Personal Background	✓	✗	✗	Not applicable
	Social Background	✓	✗	✗	Not applicable
<b>Clinical</b>	Allergy	✓	Phytel	Phytel	Terminology search (SNOMED)

Category	Data	Manual data capture	Received	Updated	Terminology search/drop-down coded list
	Condition	✓	Phytel	Phytel	Terminology search (SNOMED)
	Coverage	✗			Not applicable
	Laboratory Test	✓	Phytel	Phytel	Preconfigured list (LOINC)
	Medication	✓	Phytel	Phytel	Terminology search (NDC-11 digit)
	Observation	✗	Phytel	Phytel	Not applicable
	Risk	✓	✗	✗	Not applicable
Vitals	Blood Pressure	✓	Phytel	Phytel	Not applicable
	Body Mass Index	✓	Phytel	Phytel	Not applicable
	Body Temperature	✓	Phytel	Phytel	Not applicable
	Heart Rate	✓	Phytel	Phytel	Not applicable
	Height	✓	Phytel	Phytel	Not applicable
	Oxygen Saturation	✓	Phytel	Phytel	Not applicable
	Respiratory Rate	✓	Phytel	Phytel	Not applicable
	Waist Circumference	✓	Phytel	Phytel	Not applicable

Category	Data	Manual data capture	Received	Updated	Terminology search/drop-down coded list
	Waist-to-Height Ratio	✓	Phytel	Phytel	Not applicable
	Weight	✓	Phytel	Phytel	Not applicable
<b>Configurable data category</b>	Configurable client data type	✓	Third-party applications	Third-party applications	Not applicable
<b>Care Team Actions</b>	Care Team Actions	✓	Third-party applications	Third-party applications	Not applicable
<b>Programs</b>	Assessments	✓	Third-party applications  (Completed assessments, script and score only)	✗	Not applicable
	Questionnaires	✓	Third-party applications  (Completed questionnaires)	✗	Not applicable
<b>History</b>	Notes	✓	Third-party applications	✗	Not applicable
	Alerts	✓	Third-party applications	Third-party applications	Not applicable
	Referrals	✓	Phytel, third-party applications	Third-party applications	Not applicable

## Fields displayed on all client data types

Certain fields are displayed on all client data types that you access from the **Data** page. The fields are common to both manually created records and records from integrated systems. Some of these fields are automatically populated by Watson™ Care Manager.

Field	Mandatory	When manually created	When received from integrated systems
Updated On	Not applicable.	<p>This field is automatically populated by Watson™ Care Manager.</p> <p>Displays the date and time that the record was created or last updated in Watson™ Care Manager</p>	<p>Not applicable.</p> <p>This field is automatically populated by Watson™ Care Manager.</p> <p>Displays the date and time that the record was created or last updated in Watson™ Care Manager.</p>
Updated By	Not applicable.	<p>This field is automatically populated by Watson™ Care Manager.</p> <p>Displays the name of the user who created or last updated the record in the system</p>	<p>Not applicable.</p> <p>This field is automatically populated by Watson™ Care Manager.</p> <p>Depending on how your Watson™ Care Manager application is integrated, this field displays one of the following values:</p> <ul style="list-style-type: none"> <li>• <b>Health Data User</b></li> <li>• <b>System User</b></li> </ul> <p>By default, Watson™ Care Manager populates the Updated By field with <b>System User</b> when data is received from third-</p>

Field	Mandatory	When manually created	When received from integrated systems
			party applications. This value might be different for your organization.
Comments	No	Displays comments that were manually added to the record.	Comments for some data types are received from integrated systems if they are sent to Watson™ Care Manager.

## Contact data

Contact data includes address, email address, and phone number data. The table for each data type shows the available data, whether the data is mandatory, and the differences in the data when it is manually created or received from integrated systems.

### Common patterns for contact data

You can manually add contact data when you register a client. Contact data is also received from integrated systems when a client is automatically registered.



#### Important:

You can manually modify most contact data. In general, if a client's contact data is modified or deleted in an integrated system, their corresponding contact record in Watson™ Care Manager updates. However, if you modify contact data that was received from an integrated system, Watson™ Care Manager becomes the system of record for the data, and Watson™ Care Manager no longer receives updates to the record from the integrated system. For exceptions to these patterns, see the relevant section for each data type.

If a client's contact data is modified or deleted by a third-party application that is integrated with Watson™ Care Manager, their corresponding contact record in Watson™ Care Manager updates, provided the client's status is Active. For exceptions to these patterns, see the relevant section for each data type.



#### Note:

Watson™ Care Manager receives contact data updates for active and inactive clients. Watson™ Care Manager does not receive updates for deleted clients.

## Address data

You can add, modify and delete client address data. In addition, address records can be created, updated and deleted by integrated systems. When a client is manually registered, you can optionally choose an address type.



### Restriction:

You can modify all address data, with the exception of the address type. If you want to specify a different address type for a client, you must create new address data.

The table lists the fields that are displayed on an address record.

Field	Mandatory	When manually created	When received from integrated systems
Type	Yes	<p>Displays one of the following types:</p> <ul style="list-style-type: none"> <li>• Residential</li> <li>• Mailing</li> <li>• Work</li> <li>• Temporary</li> <li>• Old</li> <li>• Other</li> </ul> <p>If no type is entered, displays a blank value.</p>	<p>As per manually created records. Displays one of the following types, depending on the type that is received:</p> <ul style="list-style-type: none"> <li>• Residential</li> <li>• Mailing</li> <li>• Work</li> <li>• Temporary</li> <li>• Old</li> <li>• Other</li> </ul> <p>If no type is received, displays a blank value.</p>
Start Date	Yes	Displays the start date that was entered when the record was created.	If no Start Date is received from an integrated system, Watson™ Care Manager automatically populates this field with the date the record was created.

Field	Mandatory	When manually created	When received from integrated systems
End Date	No		
Physical Visit Address	No	<p>Indicates that this is the client's address for physical visits.</p> <p>If you specify a physical address for a client, this address is shown in the Context pane, search results, and My Clients list. Otherwise, the client's preferred address is shown, if specified.</p>	<p>Not applicable</p> <p>You must edit the record to indicate whether this is the client's physical visit address.</p>
Preference	No	<p>Displays one of the following preferences:</p> <ul style="list-style-type: none"> <li>• <b>blank</b></li> <li>• <b>Preferred</b></li> <li>• <b>Opt out</b></li> </ul>	<p>Not applicable.</p> <p>You must edit the address record to indicate the client's preference for communications to this address.</p>
Apt/Suite	No		
Street 1	No		
Street 2	No		
City	No		
State	No		
Zip	No		
Comments			<p>Not applicable</p> <p>Comments are not received from integrated systems. You must ed-</p>

Field	Mandatory	When manually created	When received from integrated systems
			It the address record to add a comment to the record.
Source	Yes	Displays the source of the address that was selected from a configured list.	Displays the source of the address as received from the integrated system.  The integrated system identifies the source by its external system reference.
Original Source System	No	Displays the original source system where the address originated that was selected from a configured list. The following default values are available for selection: <ul style="list-style-type: none"> <li>• Watson™ Care Manager</li> <li>• Other</li> </ul>	Displays the original source system where the address originated as received from the integrated system.  The integrated system identifies the source by its external system reference.

### Email address data

You can add, modify and delete client email address data. In addition, email address records can be created, updated and deleted by integrated systems.

The table lists the fields that are displayed on an email address record.

Field	Mandatory	When manually created	When received from integrated systems
Email Address	Yes		

Field	Mandatory	When manually created	When received from integrated systems
Type	No	<p>Displays one of the following types:</p> <ul style="list-style-type: none"> <li>• <b>Personal</b></li> <li>• <b>Business</b></li> <li>• <b>Other</b></li> <li>• <b>Temporary</b></li> <li>• <b>Old</b></li> </ul> <div data-bbox="824 707 1117 1193" style="border: 1px solid #ccc; padding: 10px; border-radius: 10px;">  <b>Note:</b>            When a client is manually registered, Watson™ Care Manager automatically sets the client's email address type to <b>Personal</b>.         </div>	<p>As per manually created records. Displays Personal, Business, Other, Temporary, or Old, depending on the type that is received.</p> <p>By default, displays <b>Personal</b> if no type is received.</p>
Preference	No	<p>Displays one of the following preferences:</p> <ul style="list-style-type: none"> <li>• <b>blank</b></li> <li>• <b>Preferred</b></li> <li>• <b>Opt out</b></li> </ul>	<p>Not applicable</p> <p>You must manually edit the email address record to indicate the client's preference for communications to this email address.</p>
Comments	No	<p>Not applicable</p> <p>Comments are not received from integrated systems. You must edit the email address record</p>	<p>Not applicable</p> <p>Comments are not received from integrated systems. You must manually edit the email ad-</p>

Field	Mandatory	When manually created	When received from integrated systems
		to add a comment to the record.	dress record to add a comment to the record.
Source	Yes	Displays the source of the email address that was selected from a configured list.	Displays the source of the email address as received from the integrated system.  The integrated system identifies the source by its external system reference.
Original Source System	No	Displays the original source system where the email address originated that was selected from a configured list.  The following default values are available for selection: <ul style="list-style-type: none"><li>• Watson™ Care Manager</li><li>• Other</li></ul>	Displays the original source system where the email address originated as received from the integrated system.  The integrated system identifies the source by its external system reference.

## Phone number data

You can add, modify and delete client phone number data. In addition, phone number records can be created, updated and deleted by integrated systems.

The table lists the fields that are displayed on a phone number record.

<b>Field</b>	<b>Mandatory</b>	<b>When manually created</b>	<b>When received from integrated systems</b>
Country Code	No		<p>Only populated if Watson™ Care Manager receives a phone number record from another IBM product and that record contains a country code.</p> <p>If Watson™ Care Manager receives a phone number record with a country code from a third-party application, this value prefixes the phone number shown in the Phone Number field.</p>
Area Code	No		<p>Only populated if Watson™ Care Manager receives a phone number record from another IBM product and that record contains an area code.</p> <p>If Watson™ Care Manager receives a phone number record with an area code from a third-party application, this value prefixes the phone number shown in the Phone Number field.</p>
Phone Number	Yes	Displays the phone number that was manually entered.	Displays the phone number that was received from the integrated system.

Field	Mandatory	When manually created	When received from integrated systems
Extension	No		<p>Only populated if Watson™ Care Manager receives a phone number record from another IBM product and that record contains an extension.</p> <p>If Watson™ Care Manager receives a phone number record with an extension from a third-party application, this value prefixes the phone number displayed in the Phone Number field.</p>
Phone Type	Yes  (For manually created phone numbers)	<p>Displays one of the following types:</p> <ul style="list-style-type: none"> <li>• <b>Home</b></li> <li>• <b>Mobile</b></li> <li>• <b>Work</b></li> <li>• <b>Other</b></li> <li>• <b>Temporary</b></li> <li>• <b>Old</b></li> </ul>	<p>As per manually created records. Displays Home, Mobile, Work, Other, Temporary, or Old, depending on the type that is received.</p> <p>By default, displays <b>Home</b> if no type is received.</p>
Start Date	Yes  (Manually created records only)	Displays the start date of the record that was entered.	If no Start Date is received from an integrated system, Watson™ Care Manager automatically populates this field with the date the record was created.
End Date	No		

<b>Field</b>	<b>Mandatory</b>	<b>When manually created</b>	<b>When received from integrated systems</b>
Preference for Calls	No		<p>Not applicable</p> <p>A client's preference for calls is not received from integrated systems. You must edit the phone number record to indicate the client's preference for calls.</p>
Preference for Texts	No		<p>Not applicable</p> <p>A client's preference for texts is not received from integrated systems. You must edit the phone number record to indicate the client's preference for texts.</p>
Comments	No		<p>Not applicable</p> <p>Comments are not received from integrated systems. You must edit the phone number record to add a comment to the record.</p>
Source	Yes	<p>Displays the source of the phone number data that was selected from a configured list.</p>	<p>Displays the source of the phone number as received from the integrated system.</p> <p>The integrated system identifies the source by</p>

Field	Mandatory	When manually created	When received from integrated systems
			its external system reference.
Original Source System	No	<p>Displays the original source system where the phone number originated that was selected from a configured list.</p> <p>The following default values are available for selection:</p> <ul style="list-style-type: none"> <li>• Watson™ Care Manager</li> <li>• Other</li> </ul>	<p>Displays the original source system where the phone number originated as received from the integrated system.</p> <p>The integrated system identifies the source by its external system reference.</p>

## Clinical data

Clinical data includes allergy, condition, laboratory test, medication data, observation, and risk data. The tables show the available data, whether the data is mandatory, and the differences when the data is manually created or received from integrated systems.

Clinical data conforms with standard coding systems for clinical data. Clinical data codes are displayed in the Reporting application for the purposes of creating reports when received from integrated systems. However, clinical data codes are not displayed in the Care Team application.

After a client is registered, you can add new Clinical data, with the exception of Coverage and Observation data.



### Important:

Clinical data from integrated systems refreshes overnight in Watson™ Care Manager and cannot be modified.

## Allergy data

Allergy data conforms with standard coding systems for allergy data. Manual data entry for the allergy name is supported by a terminology search (SNOMED). Allergy data from integrated systems might be associated with different coding systems than manually created allergy records.

The table lists the fields that are displayed on an allergy record.

Field	Mandatory	When manually created	When received from integrated systems
Allergy Name	Yes	<p>Displays the allergy name that was selected by using the terminology search (SNOMED).</p> <p>If the allergy name was manually recorded by using the <b>Record other allergy</b> option, this field displays the name that was entered.</p>	<p>Displays the allergy name that was received from the integrated system.</p> <p>When the record is received electronically, the allergy name that is displayed might be different to the names of manually created allergy records</p>
Status	Yes	<p>Displays one of the following statuses:</p> <ul style="list-style-type: none"> <li>• <b>Active</b></li> <li>• <b>Inactive</b></li> <li>• <b>Duplicate</b></li> <li>• <b>Invalid</b></li> <li>• <b>Unknown</b></li> </ul>	As per manually created records. Displays Active, Inactive, Duplicate, Invalid, or Unknown, depending on the status that is received from the integrated system.
Allergy Type	No	Displays the allergy type that was selected from a preconfigured coded list when the record was manually created.	Displays the allergy type that was received from the integrated system.
Start Date	No		

Field	Mandatory	When manually created	When received from integrated systems
End Date	No		
Reactions/Severities	No	<p>Up to three symptoms of the allergic reaction and the severity of each symptom are displayed in a comma-separated list.</p> <p>Each symptom and severity can be selected from a preconfigured coded list when the record is manually created.</p>	<p>As per manually created records. When the record is received electronically, the reactions and severities that are displayed might be different to those of manually created allergy records.</p> <p>The text (<b>Unknown</b>), is appended to each reaction that does not have an associated severity value.</p>
Currently Active		Displays <b>Yes</b> , <b>No</b> , <b>Unknown</b> , or is blank.	<p>Not applicable.</p> <p>A client's confirmed allergy status is not received from integrated systems. You can manually specify whether a client has explicitly confirmed that an allergy is currently active, if needed.</p>
Comments	No		
Source	Yes	Displays the source of the allergy data that was selected from a configured list.	<p>Not applicable.</p> <p>Displays <b>EMR</b> to indicate that the record came from an integrated system.</p>

Field	Mandatory	When manually created	When received from integrated systems
		<p>The following default sources are available for selection:</p> <ul style="list-style-type: none"> <li>• <b>Chart</b></li> <li>• <b>Encounter</b></li> <li>• <b>Lab</b></li> <li>• <b>Self Reported</b></li> </ul>	This field is automatically populated by Watson™ Care Manager.
Original Source System	No	<p>Displays the original source system where the allergy data originated that was selected from a configured list.</p> <p>The following default values are available for selection:</p> <ul style="list-style-type: none"> <li>• <b>Watson™ Care Manager</b></li> <li>• <b>Other</b></li> </ul>	Not applicable.

### Condition data

Condition data conforms with standard coding systems for condition data. Manual data entry for the condition name is supported by a terminology search (SNOMED). Condition data from integrated systems might be associated with different coding systems than manually created condition records. Condition codes from integrated systems are not displayed.



#### Note:

Problem List records in the IBM Explorys EPM Registry display as Condition records in Watson™ Care Manager.



If a condition is associated with more than one coding system in IBM Explorys EPM Registry, a separate condition record is displayed in Watson™ Care Manager for each coding system that the condition is associated with.

The table lists the fields that are displayed on a condition record.

Field	Mandatory	When manually created	When received from integrated systems
Condition Name	Yes	<p>Displays the condition name that was selected by using the terminology search (SNOMED).</p> <p>If the condition name was manually recorded by using the <b>Record other condition</b> option, this field displays the name that was entered.</p>	<p>Displays the condition name that was received from the integrated system.</p> <p>When a record is received electronically, the condition name that is displayed might be different to the name for manually created condition records.</p>
Status	Yes	<p>Displays one of the following statuses:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Inactive</li> <li>• Resolved</li> <li>• Duplicate</li> <li>• Invalid</li> </ul>	<p>Displays one of the following statuses:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Inactive</li> <li>• Resolved</li> <li>• Invalid</li> <li>• Unknown</li> </ul> <p>If the integrated system has different statuses, Watson™ Care Manager maps each status to one of the above statuses.</p>
Start Date	No		
End Date	No		

Field	Mandatory	When manually created	When received from integrated systems
Classification	No	Displays <b>Primary</b> , <b>Secondary</b> , or is blank.	Not applicable.  Condition classifications are not received from integrated systems. You can manually classify conditions from integrated systems, if needed.
Comments	No		
Source	Yes	<p>Displays the source of the condition data that was selected from a configured list.</p> <p>The following default values are available for selection:</p> <ul style="list-style-type: none"> <li>• <b>Self-Reported</b></li> <li>• <b>Chart</b></li> <li>• <b>Encounter</b></li> <li>• <b>Lab</b></li> </ul>	<p>Not applicable.</p> <p>Displays <b>EMR</b> to indicate that the record came from an integrated system.</p> <p>This field is automatically populated by Watson™ Care Manager.</p>
Original Source System	No	<p>Displays the original source system where the condition data originated that was selected from a configured list.</p> <p>The following default values are available for selection:</p>	Not applicable

Field	Mandatory	When manually created	When received from integrated systems
		<ul style="list-style-type: none"> <li>• Watson™ Care Manager</li> <li>• Other</li> </ul>	

## Coverage data

Coverage data is received from IBM Explorys products and is read-only. Coverage data cannot be manually created or modified. Coverage data conforms to the Fast Healthcare Interoperability Resources (FHIR) standard. The coverage data type is visible in the **Clinical** data category on the **Data** page when one or more records are received from the integrated system.

The table lists the fields that are displayed on a coverage record.

Field	Mandatory	When manually created	When received from integrated systems
Group	No	Not applicable	Displays the name of the group that includes the medical or insurance plan.
Plan	Yes	Not applicable	Displays the name of the medical or insurance plan.
Type	No	Not applicable	Not applicable A type is not received from integrated systems.
Subgroup	No	Not applicable	Displays the name of the sub group or subsection of the plan.
Precedence	No	Not applicable	Not applicable

Field	Mandatory	When manually created	When received from integrated systems
			A precedence is not received from integrated systems.
Status	No	Not applicable	Displays one of the following statuses: <ul style="list-style-type: none"> <li>• <b>Active</b></li> <li>• <b>Canceled</b></li> <li>• <b>Entered in error</b></li> <li>• <b>Draft</b></li> </ul>
Start Date	No	Not applicable	
End Date	No	Not applicable	
Comments	No	Not applicable	
Source	No	Not applicable	Not applicable This field is automatically populated by Watson™ Care Manager. Displays <b>Eligibility System</b> to indicate that the record came from an integrated system.
Original Source System	Yes	Not applicable	Not applicable.

## Laboratory test data

Laboratory test data conforms to the Fast Healthcare Interoperability Resources (FHIR) standard.

Manual data entry for the laboratory test name is supported by a coded list of laboratory tests (LOINC).

Laboratory test data from integrated systems might be associated with different coding systems than manually created laboratory test records.

When Watson™ Care Manager receives laboratory test data from the IBM Explorys EPM Registry, there is a two-step mapping process.

1. Watson™ Care Manager checks that the data contains a LOINC code, based on an internal reference list.
2. If the LOINC code maps to a code on the list, a laboratory test record is created by Watson™ Care Manager. If the data contains no LOINC code, or if the LOINC code received does not match a code in the list, an observation record is created.

When Watson™ Care Manager receives laboratory test data from IBM Phytel products, the following mapping steps occur.

1. Watson™ Care Manager checks that the data is classified as a **laboratory** test.
2. Watson™ Care Manager creates a laboratory test record. Otherwise, an observation is record is created.



**Note:**

Laboratory tests that are up to two years old are displayed when the records come from IBM Explorys EPM Registry.

Laboratory test records that are up to two years old are also displayed when the records come from IBM Phytel products. However if the last laboratory test record received is older than two years, Watson™ Care Manager displays that record.

The table lists the fields that are displayed on a laboratory test record.

Field	Mandatory	When manually created	When received from integrated systems
Laboratory Test Name	Yes	Displays the laboratory test name that was selected from the preconfigured coded list when the record was manually created (LOINC).	Displays the laboratory test name that was received from the integrated system.  When the record is received electronically, the laboratory test name that is displayed might be different to the name

<b>Field</b>	<b>Mandatory</b>	<b>When manually created</b>	<b>When received from integrated systems</b>
			for manually created laboratory test records.
Value	No	<p>Displays the value that was added to the record.</p> <p>If the record from the integrated system has no comparator, value, unit, or value string, the Value field is blank.</p> <p>For example, if a record has a comparator (&lt;), a value (1.5) and a unit (mEq/L).</p> <p>The Value field displays &lt;1.5 mEq/L.</p> <p>If WCM receives a value without a unit, the Value field displays only the value. For example, 1.5.</p>	<p>Displays the data that is received from the integrated system. This could be one or any combination of the following:</p> <ul style="list-style-type: none"> <li>• Comparator (&lt; &gt; =)</li> <li>• Value</li> <li>• Unit</li> <li>• Value String</li> </ul>

Field	Mandatory	When manually created	When received from integrated systems
Units	No	Displays units added to manually created laboratory test records only.	Not applicable
Service Date	Yes		
Status	Yes	<p>Displays one of the following values:</p> <ul style="list-style-type: none"> <li>• <b>Registered</b></li> <li>• <b>Preliminary</b></li> <li>• <b>Correction to Results</b></li> <li>• <b>Final Results</b></li> <li>• <b>Procedure Incomplete</b></li> <li>• <b>Valid</b></li> <li>• <b>Invalid</b></li> <li>• <b>Unknown</b></li> <li>• <b>Completed</b></li> <li>• <b>Order Cancelled</b></li> <li>• <b>Entered-in-error</b></li> <li>• <b>Results stored; Not Verified</b></li> <li>• <b>Procedure Scheduled, but not done</b></li> <li>• <b>No order on Record</b></li> <li>• <b>No Record of this Patient</b></li> <li>• <b>Duplicate</b></li> </ul>	<p>Displays one of the following values:</p> <ul style="list-style-type: none"> <li>• <b>Registered</b> (Maps to the <b>Registered</b> status FHIR standard).</li> <li>• <b>Preliminary</b> (Maps to the <b>Unknown</b> status FHIR standard)</li> <li>• <b>Final</b> (Maps to the <b>Final</b> status FHIR standard)</li> <li>• <b>Amended</b> (Maps to the <b>Correction to Result</b> status FHIR standard).</li> <li>• <b>Valid</b> (Maps to the <b>Valid</b> status FHIR standard).</li> <li>• <b>Unknown</b> (Maps to the <b>Unknown</b> status in FHIR).</li> <li>• <b>Corrected</b> (Maps to the <b>Correction to Result</b> status FHIR standard).</li> <li>• <b>Cancelled</b> (Maps to the <b>Order Can-</b></li> </ul>

Field	Mandatory	When manually created	When received from integrated systems
			<p>celled status FHIR standard).</p> <ul style="list-style-type: none"> <li>• <b>Entered-in-error</b> (Maps to the <b>In-valid</b> status FHIR standard).</li> </ul>
Comments	No		
Source	Yes	<p>Displays the source of the laboratory test data that was selected from a configured list.</p> <p>The following default values are available for selection:</p> <ul style="list-style-type: none"> <li>• <b>Self-Reported</b></li> <li>• <b>Chart</b></li> <li>• <b>Encounter</b></li> <li>• <b>Lab</b></li> </ul>	<p>Not applicable.</p> <p>Displays <b>EMR</b> to indicate that the record came from an integrated system.</p> <p>This field is automatically populated by Watson™ Care Manager.</p>
Original Source System	No	<p>Displays the original source system where the laboratory test data originated that was selected from a configured list.</p> <p>The following default values are available for selection:</p> <ul style="list-style-type: none"> <li>• <b>Watson™ Care Manager</b></li> <li>• <b>Other</b></li> </ul>	Not applicable

## Medication data

Medication data conforms with standard coding systems for medication data. Medications from integrated systems might be associated with different coding systems than manually created medication records.



### Note:

Medication data that comes from integrated systems is read-only. Users can manually indicate whether a client is currently taking a particular medication.

The table lists the fields that are displayed on a medication record.

Field	Mandatory	When manually created	When received from integrated systems
Medication Name	Yes	<p>Displays the medication name that was selected by using the terminology search (NDC-11 digit).</p> <p>If the medication name was manually recorded by using the <b>Record other medication</b> option, this field displays the name that was entered.</p>	<p>Displays the medication name that was received from the integrated system. When a record is received electronically, the medication name that is displayed might be different to the name for manually created medication records.</p>
Status	Yes	<p>Displays one of the following statuses:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Inactive</li> <li>• Self Refused</li> <li>• Refused for medical reasons</li> <li>• Unknown</li> </ul>	<p>Displays one of the following statuses:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Inactive</li> <li>• Duplicate</li> <li>• Invalid</li> <li>• Unknown</li> </ul> <p>If the integrated system has different statuses, Watson™ Care Manager</p>

Field	Mandatory	When manually created	When received from integrated systems
			maps each status to one of the above statuses.
Type	No	<p>Displays one of the following types:</p> <ul style="list-style-type: none"> <li>• OTC</li> <li>• Prescribed</li> <li>• Other</li> <li>• blank</li> </ul>	<p>Displays the medication type from the integrated system. When a record is received electronically, the type that is displayed might be different to the type for manually created medication records.</p>
SIG	No	<p>Displays the values that were entered in the following fields, in this order:</p> <ul style="list-style-type: none"> <li>• Quantity</li> <li>• Strength</li> <li>• Dose Form</li> <li>• Route</li> <li>• Frequency</li> <li>• Duration</li> </ul>	<p>Displays the values that were received from the integrated system in the following fields, in this order:</p> <ul style="list-style-type: none"> <li>• <b>Quantity</b> (The text <code>(quantityEMR)</code> is appended to the quantity value.)</li> <li>• <b>Strength</b> (The text <code>(strength)</code> is appended to the strength value.)</li> <li>• <b>Dose Form</b> (The text <code>(doseFormEMR)</code> is appended to the dose form value.)</li> <li>• <b>Route</b> (The text <code>(routeFormEMR)</code> is</li> </ul>

Field	Mandatory	When manually created	When received from integrated systems
			<p> appended to the Route value.)</p> <ul style="list-style-type: none"> <li>• <b>Frequency</b> (The text (frequency-EMR) is appended to the Frequency value.)</li> <li>• <b>Duration</b> (The text (duration) is appended to the Duration value.)</li> </ul>
Classes		<p>Not applicable</p> <p>Medication classes cannot be manually created.</p>	<p>Displays a comma-separated list of medication classes that are received from the integrated system.</p>
Date	<p>Not applicable</p> <p>Watson™ Care Manager automatically populates this field based on which date is available in the record.</p> <p>In the following order, the date might be the medication start date, ordered date, prescribed date, fill date, or last refill date, depending on which date is entered. If no date is available, the date is the record creation date.</p>		<p>As per manually created records.</p>
Strength	No	<p>If the medication was selected by using the</p>	<p>Displays a numeric value and unit of measure-</p>

Field	Mandatory	When manually created	When received from integrated systems
		<p>terminology search, displays the medication strength that was selected from the list of valid medication strengths, based on the search.</p> <p>If the medication was manually recorded by using the <b>Record other medication</b> option, displays the medication strength that was entered.</p>	<p>ment that was received from the integrated system. The text <code>(strength)</code> is appended to the duration value.</p> <p>When a record is received electronically, the medication strength that is displayed might be different to the strength for manually created medication records.</p>
Dose Form	No	<p>Displays the form of medication that was selected from the list of forms.</p>	<p>Displays the dose form that was received from the integrated system. The text <code>(doseFormEMR)</code> is appended to the dose form value.</p> <p>When a record is received electronically, the dose form that is displayed might be different to the dose form for manually created medication records.</p>
Route	No	<p>Displays the path that the medication entered the client's body that was selected from the list of routes.</p>	<p>Displays the route that was received from the integrated system. The text <code>(routeFormEMR)</code> is appended to the route value.</p>

<b>Field</b>	<b>Mandatory</b>	<b>When manually created</b>	<b>When received from integrated systems</b>
			When a record is received electronically, the medication route value that is displayed might be different to the value for manually created medication records.
Quantity	No		<p>Displays the quantity that was received from the integrated system. The text (<code>quantityEMR</code>) is appended to the dose form value.</p> <p>When a record is received electronically, the medication route that is displayed might be different to the route for manually created medication records.</p>
Frequency	No	<p>Displays the frequency value that was selected from a preconfigured coded list when the record was manually created.</p>	<p>Displays the frequency that was received from the integrated system. The text (<code>frequencyEMR</code>) is appended to the frequency value.</p> <p>When a record is received electronically, the frequency that is displayed might be different to the frequency for</p>

Field	Mandatory	When manually created	When received from integrated systems
			manually created medication records.
Duration	No	Displays the duration that was selected from a preconfigured coded list when the record was manually created.	Displays the duration that was received from the integrated system. The text <code>(duration)</code> is appended to the duration value.  When a record is received electronically, the duration that is displayed might be different to the duration for manually created medication records.
Start Date	No		
End Date	No		
Ordered By	No		
Ordered Date	No		
Prescription Number	No		
Prescribed Date	No		
Prescribed By	No		
Fill Date	No		
Pharmacy	No		
Review	No	Displays one of the following values:  • <b>Duplicate</b> • <b>Needs Review</b>	Not applicable

Field	Mandatory	When manually created	When received from integrated systems
		<ul style="list-style-type: none"> <li>• <b>Verified</b></li> <li>• <b>Unknown</b></li> </ul>	
Dispensed Quantity	No		
Last Refill Date	No		
Refills	No		
Instructions	No		
Reason	No		
Refused Reason	No		
Comments	No		
Source	No	<p>Displays the source of the medication data that was selected from a configured list.</p> <p>The following default values are available for selection:</p> <ul style="list-style-type: none"> <li>• <b>Chart</b></li> <li>• <b>Encounter</b></li> <li>• <b>Lab</b></li> <li>• <b>Self Reported</b></li> </ul>	<p>Not applicable.</p> <p>Displays <b>EMR</b> to indicate that the record came from an integrated system.</p> <p>This field is automatically populated by Watson™ Care Manager.</p>
Original Source System	No	<p>Displays the original source system where the medication data originated that was selected from a configured list.</p> <p>The following default values are available for selection:</p>	Not applicable

Field	Mandatory	When manually created	When received from integrated systems
		<ul style="list-style-type: none"> <li>• Watson™ Care Manager</li> <li>• Other</li> </ul>	

## Observation data

Observation data is received from integrated systems and is read-only. Observation data is visible in the **Clinical** data category on the **Data** page when one or more records are received from the integrated system.

When Watson™ Care Manager receives observation data, it maps the data to an appropriate data type, typically a Watson™ Care Manager Laboratory Test or a Vital type. If Watson™ Care Manager cannot map the data to an appropriate data type, an Observation record is created in the Clinical data category. Observation data from integrated systems can be vitals data, laboratory test data, or any other data that cannot be mapped to a Watson™ Care Manager data type.

When observation data comes from the IBM Explorys EPM Registry, Watson™ Care Manager maps the data to an appropriate data type based on its associated LOINC code. For example, if blood pressure data is received that contains a LOINC code that maps to the Blood Pressure LOINC code in an internal reference list, a blood pressure record is created in the Vitals data category. If the data is not associated with a LOINC code, or the LOINC code received does not map to a LOINC code in the list, an Observation record is created.

When observation data comes from IBM Phytel products, Watson™ Care Manager maps the data to an appropriate data type, based on whether the data is classified in the integrated system. For example, if the data is classified as a **laboratory** test, a Laboratory Test record is created in the Clinical data category. If the data is classified as a **vitals-sign** and specified as Height data, Watson™ Care Manager creates a **Height** record in the **Vitals** data category. Otherwise, Watson™ Care Manager creates an observation record.

The table lists the fields that are displayed on an observation record.

Field	Mandatory	When manually created	When received from integrated systems
Name	Yes	Not applicable	Displays the name that was received from the integrated system.

Field	Mandatory	When manually created	When received from integrated systems
Type	No	Not applicable	<p>Not applicable</p> <p>This field is not populated by Watson™ Care Manager.</p>
Value	No	No applicable	<p>Displays the data that is received from the integrated system. This could be one or any combination of the following:</p> <ul style="list-style-type: none"> <li>• Comparator (&lt; &gt; =)</li> <li>• Value</li> <li>• Unit</li> <li>• Value String</li> </ul> <p>If the record from the integrated system has no comparator, value, unit, or value string, the Value field is blank.</p> <p>For example, if a record has a comparator (&lt;), a value (1.5) and a unit (mEq/L).</p> <p>The Value field displays &lt;1.5 mEq/L.</p> <p>If WCM receives a value without a unit, the Value field displays only the value. For example, 1.5.</p>

Field	Mandatory	When manually created	When received from integrated systems
Date	Yes	Not applicable	Displays the date that the observation measurement was created.
Status	Yes	Not applicable	<p>Displays one of the following statuses, depending on the status that is received from the integrated system:</p> <ul style="list-style-type: none"> <li>• <b>Registered</b></li> <li>• <b>Preliminary</b></li> <li>• <b>Final</b></li> <li>• <b>Amended</b></li> <li>• <b>Valid</b></li> <li>• <b>Unknown</b></li> <li>• <b>Correction to Result</b></li> <li>• <b>Canceled</b></li> <li>• <b>Invalid</b></li> </ul> <p>If the integrated system has different statuses, Watson™ Care Manager maps each status to one of the above statuses.</p>
Measurement Method	No	Not applicable	Displays the method used to perform the observation that was received from the integrated system.
Observation Site	No	Not applicable	Displays the site of the client's body where the observation was made.

Field	Mandatory	When manually created	When received from integrated systems
Source	Not applicable	Not applicable	<p>Not applicable</p> <p>This field is automatically populated by Watson™ Care Manager.</p> <p>Displays <b>EMR</b> to indicate that the record came from an integrated system.</p>
Original Source System	No	Not applicable	Not applicable

## Risk data

Clinical risk data can be manually created and received from integrated systems. For example, Watson™ Care Manager can receive the following risks from integrated systems:

- ERM (Medicare/Concurrent/Commercial/Prospective)
- HCC-Billing
- HCC-Clinical
- LACE
- Charlson Deyo

Administrators can configure the risks that are applicable to the organization so they are available for selection when they are manually created in the care team application.

The table lists the fields that are displayed on a risk record.

Field	Mandatory	When manually created	When received from integrated systems
Name	Yes	Displays the risk name that was selected from the configured list when the record was manually created.	Displays the risk name from the integrated system. When the record is received electronically, the risk name that is displayed might be different to the name of

Field	Mandatory	When manually created	When received from integrated systems
			manually created risk records.
Date	Yes		
Score	Yes		
Category	No	Displays the configured category that the risk score falls into.	Displays the risk category from the integrated system. When the record is received electronically, the risk category that is displayed might be different to the category for manually created risk records.
Comments	No		
Source	Yes	<p>Displays the source of the risk data that was selected from a configured list.</p> <p>The following default values are available for selection:</p> <ul style="list-style-type: none"> <li>• <b>Analytics (External)</b></li> <li>• <b>Analytics (Internal)</b></li> <li>• <b>Hospital Information System</b></li> <li>• <b>Other</b></li> <li>• <b>Outside Provider</b></li> <li>• <b>Payer</b></li> </ul>	<p>Not applicable.</p> <p>Displays <b>EMR</b> to indicate that the record came from an integrated system.</p> <p>This field is automatically populated by Watson™ Care Manager.</p>

Field	Mandatory	When manually created	When received from integrated systems
		<ul style="list-style-type: none"> <li>• <b>Practive Management System</b></li> <li>• <b>Self Reported</b></li> </ul>	
Original Source System	No	<p>Displays the original source system where the risk data originated that was selected from a configured list.</p> <p>The following default values are available for selection:</p> <ul style="list-style-type: none"> <li>• <b>Watson™ Care Manager</b></li> <li>• <b>Other</b></li> </ul>	Not applicable

## Demographics data

Client demographics data includes birth and death, gender, marital status, identification, and name data. The table for each data type shows the available data, whether the data is mandatory, and the differences in the data when it is manually created or received from integrated systems.

### Common patterns for demographics data

You can manually add demographics data when you register a client. Demographics data is also received from integrated systems when a client is registered either manually or automatically.



#### Important:

You can manually modify most demographics data. In general, if a client's demographic data is modified or deleted in an integrated system, their corresponding demographic record in Watson™ Care Manager updates. However, if you modify demographics data that was received from an integrated system, Watson™ Care Manager becomes the system of record for the data, and Watson™ Care Manager no longer receives updates to the record from the integrated system. For exceptions to these patterns, see the relevant section for each data type.

**Note:**

Watson™ Care Manager receives demographics data updates for active and inactive clients.

Watson™ Care Manager does not receive updates for deleted clients.

## Birth and death data

A client has only one birth and death record. You can modify the birth and death record that was created when the client was registered. You cannot manually create or delete a birth and death record. In addition, a client's birth and death record can be updated by an integrated system, but not deleted. If the client was manually registered, updates to the client's date of birth and date of death are not received from integrated systems.

The table lists the fields that are displayed on a client's birth and death record.

Field	Mandatory	When manually created	When received from integrated systems
Birth Last Name	No		<p>Displays the last name value that was received from the integrated system.</p> <p>You must manually edit the birth and death record to modify a client's last name at birth.</p>
Mother's Birth Last Name	No	<p>You must manually edit the record that was created when the client was registered to enter their mother's last name at birth.</p>	<p>Not applicable</p> <p>You must manually edit the record to enter a client's mother's last name at birth.</p>
Date of Birth	Yes		
Date of Death	No		If no date of death is received but the integrated system indicates that

<b>Field</b>	<b>Mandatory</b>	<b>When manually created</b>	<b>When received from integrated systems</b>
			the client is deceased, the date that the record was created in Watson™ Care Manager is displayed.
Comments	No		Not applicable  Comments are not received from integrated systems. You must edit the birth and death record to add a comment to the record.
Source	Yes	Displays the source of the birth and death data that was selected from a configured list.	Displays the source of the birth and death data as received from the integrated system.  The integrated system identifies the source by its external system reference.
Original Source System	No	Displays the original source system where the birth and death data originated that was selected from a configured list.  The following default values are available for selection:	Displays the original source system where the birth and death originated as received from the integrated system.  The integrated system identifies the source by its external system reference.

Field	Mandatory	When manually created	When received from integrated systems
		<ul style="list-style-type: none"> <li>• Watson™ Care Manager</li> <li>• Other</li> </ul>	

## Gender data

You can manually create gender data and a client's gender can be received from integrated systems. A client has only one current gender record, which is the record with the most recent Start Date. If the client was manually registered, updates to the client's gender are not received from integrated systems.

If you create new gender data, or new gender data is received from an integrated system, Watson™ Care Manager automatically end dates the old gender record. You cannot delete gender records. In addition, gender records can only be added and updated by integrated systems, but not deleted.

The table lists the fields that are displayed on a gender record.

Field	Mandatory	When manually created	When received from integrated systems
Gender	Yes	<p>Displays one of the following types:</p> <ul style="list-style-type: none"> <li>• Male</li> <li>• Female</li> <li>• Other</li> <li>• Unknown</li> </ul>	As per manually created records. Displays Male, Female, Other, Unknown, depending on the type that is received from the integrated system.
Start Date	<p>Yes (Manually created records only)</p>	<p>Displays the start date that was entered when the record was manually created.</p> <p>By default, when a client is registered this field displays the client's date of birth.</p>	<p>If no start date is received, Watson™ Care Manager populates this field with the date the record was created in Watson™ Care Manager.</p> <p>By default, when a client is registered this field</p>

Field	Mandatory	When manually created	When received from integrated systems
			displays the client's date of birth.
End Date	No		
Comments	No		<p>Not applicable</p> <p>Comments are not received from integrated systems. You must edit the gender record to add a comment to the record.</p>
Source	Yes	<p>Displays the source of the gender data that was selected from a configured list of sources.</p>	<p>Displays the source of the gender as received from the integrated system.</p> <p>The integrated system identifies the source by its external system reference.</p>
Original Source System	No	<p>Displays the original source system where the gender data originated that was selected from a configured list.</p> <p>The following default values are available for selection:</p> <ul style="list-style-type: none"> <li>• Watson™ Care Manager</li> <li>• Other</li> </ul>	<p>Displays the original source system where the gender originated as received from the integrated system.</p> <p>The integrated system identifies the source by its external system reference.</p>

## Marital Status data

You can manually create marital status data and a client's marital status can be received from integrated systems. A client has only one current marital status record, which is the record with the most recent Start Date. If the client was manually registered, updates to the client's marital status are not received from integrated systems.

If you create new marital status data, or new marital status data is received from an integrated system, Watson™ Care Manager automatically end dates the old marital status record. You can delete marital status records. In addition, marital status records can be created, updated and deleted by integrated systems.

The table lists the fields that are displayed on a marital status record.

Field	Mandatory	When manually created	When received from integrated systems
Marital Status	Yes	<p>Displays one of the following types:</p> <ul style="list-style-type: none"> <li>• <b>Married</b></li> <li>• <b>Single</b></li> <li>• <b>Life Partner</b></li> <li>• <b>Divorced</b></li> <li>• <b>Legally Separated</b></li> <li>• <b>Annulled</b></li> <li>• <b>Widowed</b></li> <li>• <b>Interlocutory</b></li> <li>• <b>Polygamous</b></li> <li>• <b>Not Disclosed/Unknown</b></li> </ul>	As per manually created records, depending on the type that is received from the integrated system.
Start Date	Yes  (Manually created records only)	Displays the start date that was entered when the record was manually created.	If no start date is received, Watson™ Care Manager populates this field with the date the record was created in Watson™ Care Manager.

<b>Field</b>	<b>Mandatory</b>	<b>When manually created</b>	<b>When received from integrated systems</b>
End Date	No		
Comments	No		<p>Not applicable</p> <p>Comments are not received from integrated systems. You must edit the marital status record to add a comment to the record.</p>
Source	Yes	<p>Displays the source of the marital status data that was selected from a configured list.</p>	<p>Displays the source of the marital status as received from the integrated system.</p> <p>The integrated system identifies the source by its external system reference.</p>
Original Source System	No	<p>Displays the original source system where the marital status data originated that was selected from a configured list.</p> <p>The following default values are available for selection:</p> <ul style="list-style-type: none"> <li>• Watson™ Care Manager</li> <li>• Other</li> </ul>	<p>Displays the original source system where the marital status originated as received from the integrated system.</p> <p>The integrated system identifies the source by its external system reference.</p>

## Identification data

Client identification data from integrated systems is shared with Watson™ Care Manager when the client is automatically registered. A client can have multiple identification records. If another identification record is created in the integrated system for the client, a corresponding record is created in Watson™ Care Manager. If the record is updated or deleted in the integrated system, the corresponding record in Watson Care Manager is updated or deleted.



### Restriction:

You cannot modify or update identification records that are received from IBM Explorys or IBM Phytel applications. If an identification record is received from a third-party application, you can modify the identification number. The identification type is read-only.



### Note:

A system-generated identification, **Reference Number**, is automatically assigned to each client when the client is registered. The **Reference Number** cannot be updated or deleted. Watson™ Care Manager automatically sets the **Reference Number** identification to be the client's preferred identification details.

The table lists the fields that are displayed on an identification record.

Field	Mandatory	When automatically created	When manually created	When received from integrated systems
Type	Yes	Displays <b>Reference Number</b>	Displays the type that was selected from the list of configured identification types for your organization.	As per manually created types. The integrated system identifies the identification type by its external system reference.
Identification Number	Yes	Displays the numeric value that is associated with the <b>Reference</b>	Displays the numeric, alphabet, or alphanumeric value that is associated	As per manually created records.

Field	Mandatory	When automatically created	When manually created	When received from integrated systems
		<b>Number</b> identification type.	with the identification type.	
Start Date	No		If a start date is not entered, Watson™ Care Manager automatically populates this field with the record creation date.	If the record was received from IBM Explorys or IBM Phytel, this data is not received.  Watson™ Care Manager automatically populates this field with the record creation date.  If a start date was received from a third-party application, the start date is displayed. If no start date is received, Watson™ Care Manager populates this field with the record creation date.
End Date	No			
Preferred Identification	No	Displays <b>Yes</b> by default.	You can specify a preferred identification for manually added identifications only.	Not applicable  Preferred identification data is not received from integrated systems.

Field	Mandatory	When automatically created	When manually created	When received from integrated systems
			<p>A client can have only one preferred identification.</p> <p>By default, the application automatically sets the Reference Number as the client's preferred identification when it is created.</p> <p>You can change this to different Identification Number and Type by editing an existing record, or adding a new one, and checking the <b>Preferred Identification</b> check box.</p>	<p>You can specify a preferred identification for manually added identifications only.</p>
Comments	No	Not applicable		<p>Not applicable</p> <p>Comments are not received from integrated systems.</p>
Source	Yes	Not applicable	<p>Displays the source of the identification data that was selected from a configured list.</p>	<p>Displays the source of the identification as received from the integrated system.</p>

Field	Mandatory	When automatically created	When manually created	When received from integrated systems
				The integrated system identifies the source by its external system reference.
Original Source System	No	Not applicable	<p>Displays the original source system where the identification data originated that was selected from a configured list.</p> <p>The following default values are available for selection:</p> <ul style="list-style-type: none"> <li>• Watson™ Care Manager</li> <li>• Other</li> </ul>	<p>Displays the original source system where the identification originated as received from the integrated system.</p> <p>The integrated system identifies the source by its external system reference.</p>

## Name data

Watson™ Care Manager automatically sets a client's name type to **Registered** when the client is registered.



### Restriction:

You can modify any name data that exists for a client, with the exception of the name type. If you want to specify a different type of name for a client, you must add new name data.

**Note:**

Watson™ Care Manager automatically populates the **Initials** field with the first letter of a client's first name, middle name (if available), and last name. You can modify the initials data by editing the name record, if needed.

The table lists the fields that are displayed on a name record.

Field	Mandatory	When manually created	When received from integrated systems
Title	No	Displays the client's title that was selected from the list of configured titles for your organization.	If the record was received from IBM Explorers, or IBM Phytel, titles are not received. You must edit the name record to specify a client's title.  If the record was received from a third-party application, the integrated system identifies the title by its external system reference.
First Name	Yes		
Middle Name	No		
Last Name	Yes		
Suffix	No	Displays the client's suffix that was selected from the configured list of suffixes for your organization.	If the record was received from IBM Explorers, or IBM Phytel, suffixes are not received. You must edit the name record to specify a client's suffix.  If the record was received from a third-party

Field	Mandatory	When manually created	When received from integrated systems
			application, the integrated system identifies the suffix by its external system reference.
Initials	No		Not applicable  Initials data is not received from integrated systems.
Type	Yes	<p>Displays one of the following types:</p> <ul style="list-style-type: none"> <li>• <b>Registered</b></li> <li>• <b>Preferred</b></li> <li>• <b>Maiden</b></li> <li>• <b>Alias</b></li> <li>• <b>Stage Name</b></li> <li>• <b>Old</b></li> </ul>	<p>If the record was received from IBM Explorys, or IBM Phytel, name types are not received. To change the <b>Registered</b> type that is assigned to each client at registration to a different type, you must add a new name record.</p> <p>If the record was received from a third-party application, one of the following types is displayed:</p> <ul style="list-style-type: none"> <li>• <b>Alias</b></li> <li>• <b>Preferred</b></li> <li>• <b>Registered</b></li> <li>• <b>Stage Name</b></li> <li>• <b>Old</b></li> <li>• <b>Maiden</b></li> <li>• <b>Temporary</b></li> <li>• <b>Anonymous</b></li> </ul>

Field	Mandatory	When manually created	When received from integrated systems
Comments	No		<p>Not applicable</p> <p>Comments are not received from integrated systems. You must edit the name record to add a comment to the record.</p>
Source	Yes	<p>Displays the source of the name data that was selected from a configured list.</p>	<p>Displays the source of the name data as received from the integrated system.</p> <p>The integrated system identifies the source by its external system reference.</p>
Original Source System	No	<p>Displays the original source system where the name data originated that was selected from a configured list.</p> <p>The following default values are available for selection:</p> <ul style="list-style-type: none"> <li>• Watson™ Care Manager</li> <li>• Other</li> </ul>	<p>Displays the original source system where the name data originated as received from the integrated system.</p> <p>The integrated system identifies the source by its external system reference.</p>

## Tag data

Care teams use tags to record information about a client that is important to your organization, for example, whether a client is a member of an organization or group. You can manually create , modify, and

delete tag data for clients. In addition, tag data can be automatically created, updated, and deleted for registered clients by third-party applications through the Demographics: Tag API.



**Note:**

Third-party party application that are integrated with Watson™ Care Manager can also retrieve a client's tag data from Watson™ Care Manager through the Tag API.

The table lists the fields that are displayed on a tag record.

Field	Mandatory	When manually created	When received from integrated systems
Name	Yes	Displays the name of the client's tag that was selected from the list of configured tags for your organization.	Displays the name of the tag as received from the integrated system.
Source	Yes	Displays the source of the tag data that was selected from a configured list.	Displays the source of the tag data as received from the integrated system.  The integrated system identifies the source by its external system reference.
Original Source System	No	Displays the original source system where the tag data originated that was selected from a configured list.  The following default values are available for selection:	Displays the original source system where the tag data originated as received from the integrated system.  The integrated system identifies the source by its external system reference.

Field	Mandatory	When manually created	When received from integrated systems
		<ul style="list-style-type: none"> <li>• Watson™ Care Manager</li> <li>• Other</li> </ul>	

## Vitals data

Vitals data includes blood pressure, body temperature, and body mass index data. The tables show the available data, whether the data is mandatory, and the differences in the data when it is manually created or received from integrated systems.

Vitals data conforms with standard coding systems for vital signs data. If received from integrated systems, vitals data codes are displayed in the Reporting application for the purposes of creating reports. However, vitals codes are not displayed in the Care Team application.

After a client is registered, you can add new Clinical data, with the exception of Coverage and Observation data.



### Important:

Clinical data from integrated systems refreshes overnight in Watson™ Care Manager and cannot be modified.

## Mapping vitals data from integrated systems

When vitals data comes from IBM Phytel products, the following mapping steps occur.

1. Watson™ Care Manager checks that the data is classified as a `vitals-sign` and is specified as a particular vitals sign type, such as Weight.
2. Watson™ Care Manager creates an appropriate vitals data record in the Clinical data category, for example, a Weight record. Otherwise, an observation is record is created.

## Fields displayed on all Vitals data records

The table lists the fields that are displayed on all vitals data records.

Field	Mandatory	When manually created	When received from integrated systems
Measurement Date	Yes		

Field	Mandatory	When manually created	When received from integrated systems
Source	Yes	<p>Displays the source of the vitals data that was selected from a configured list.</p> <p>The following default values are available for selection:</p> <ul style="list-style-type: none"> <li>• <b>Chart</b></li> <li>• <b>Encounter</b></li> <li>• <b>Lab</b></li> <li>• <b>Self Reported</b></li> </ul>	<p>Not applicable</p> <p>This field is automatically populated by Watson™ Care Manager.</p> <p>Displays <b>EMR</b> to indicate that the record came from an integrated system.</p>
Original Source	No	<p>Displays the original source system where the vitals data originated that was selected from a configured list.</p> <p>The following default values are available for selection:</p> <ul style="list-style-type: none"> <li>• <b>Watson™ Care Manager</b></li> <li>• <b>Other</b></li> </ul>	Not applicable
Status	<p>Displays one of the following values:</p> <ul style="list-style-type: none"> <li>• <b>Amended</b></li> <li>• <b>Canceled</b></li> <li>• <b>Completed</b></li> <li>• <b>Duplicate</b></li> <li>• <b>Invalid</b></li> </ul>		<p>Displays one of the following values:</p> <ul style="list-style-type: none"> <li>• <b>Registered</b> (Maps to the <b>Registered</b> status FHIR standard).</li> <li>• <b>Preliminary</b> (Maps to the <b>Un-</b></li> </ul>

Field	Mandatory	When manually created	When received from integrated systems
			<p><b>known</b> status          FHIR standard)</p> <ul style="list-style-type: none"> <li>• <b>Final</b> (Maps to the <b>Final</b> status FHIR standard)</li> <li>• <b>Amended</b> (Maps to the <b>Correction to Result</b> status FHIR standard).</li> <li>• <b>Valid</b> (Maps to the <b>Valid</b> status FHIR standard).</li> <li>• <b>Unknown</b> (Maps to the <b>Unknown</b> status in FHIR).</li> <li>• <b>Corrected</b> (Maps to the <b>Correction to Result</b> status FHIR standard).</li> <li>• <b>Cancelled</b> (Maps to the <b>Order Cancelled</b> status FHIR standard).</li> <li>• <b>Entered-in-error</b> (Maps to the <b>Invalid</b> status FHIR standard).</li> </ul>
Verified by	No	Displays the name of the healthcare professional who captured and verified the data that was entered.	<p>Not applicable</p> <p>This data is not received from integrated systems.</p>
Comments	No		

## Blood Pressure data

The table lists the fields that are displayed on a blood pressure record.

Field	Mandatory	When manually created	When received from integrated systems
Blood Pressure	Yes	<p>Displays the following values that were created:</p> <ul style="list-style-type: none"> <li>• <b>Systolic</b></li> <li>• <b>Systolic units</b> (mmHg or kPa)</li> <li>• <b>Diastolic</b></li> </ul>	<p>When the data is received from IBM Phytel, Watson™ Care Manager creates one blood pressure record. A / separates the systolic and diastolic values.</p>
Measurement Site	No	<p>Displays one of the following values:</p> <ul style="list-style-type: none"> <li>• <b>Ankle Left</b></li> <li>• <b>Ankle Right</b></li> <li>• <b>Forearm Left</b></li> <li>• <b>Forearm Right</b></li> <li>• <b>Other</b></li> <li>• <b>Thigh Left</b></li> <li>• <b>Thigh Right</b></li> <li>• <b>Upper Arm Left</b></li> <li>• <b>Upper Arm Right</b></li> </ul>	<p>Displays the measurement site that was received from the integrated system.</p> <p>When the record is received electronically, the measurement site that is displayed might be different to the measurement site for manually created blood pressure records.</p>
Observation Method	No	<p>Displays one of the following values:</p> <ul style="list-style-type: none"> <li>• <b>Lying</b></li> <li>• <b>Sitting</b></li> <li>• <b>Standing</b></li> </ul>	<p>Displays the observation method that was received from the integrated system.</p> <p>When the record is received electronically, the observation site that is displayed might be different to the observa-</p>

Field	Mandatory	When manually created	When received from integrated systems
			tion method for manually created blood pressure records.

## Body Mass Index data

The table lists the fields that are displayed on a body mass index record.

Field	Mandatory	When manually created	When received from integrated systems
Body Mass Index	Yes	Displays the body mass index measurement that was created.	Displays the body mass index measurement that was received from the integrated system.

## Body Temperature data

The table lists the fields that are displayed on a body temperature record.

Field	Mandatory	When manually created	When received from integrated systems
Body Temperature	Yes	<p>Displays the following values that were created:</p> <ul style="list-style-type: none"> <li>• <b>Body Temperature</b></li> <li>• <b>Units (°F or °C)</b></li> </ul>	<p>Displays the data that is received from the integrated system. This could be one or any combination of the following:</p> <ul style="list-style-type: none"> <li>• Comparator (&lt; &gt; = )</li> <li>• Value</li> <li>• Unit</li> <li>• Value String</li> </ul> <p>For example, if a record has a comparator (&lt; ), a</p>

Field	Mandatory	When manually created	When received from integrated systems
			<p>value (99) and a unit (°F), the Body Temperature field displays &lt;99 °F.</p> <p>If Watson™ Care Manager receives a value without a unit, the Value field displays only the value. For example, 99.</p>
Measurement Site	No	<p>Displays one of the following values:</p> <ul style="list-style-type: none"> <li>• <b>Axillary</b></li> <li>• <b>Ear</b></li> <li>• <b>Forehead</b></li> <li>• <b>Oral</b></li> <li>• <b>Rectal</b></li> </ul>	<p>Displays the measurement site that was received from the integrated system.</p> <p>When the record is received electronically, the measurement site that is displayed might be different to the measurement site for manually created body temperature records.</p>
Measurement Method	No	<p>Displays one of the following values:</p> <ul style="list-style-type: none"> <li>• <b>Ear Thermometer</b></li> <li>• <b>Electronic Thermometer</b></li> <li>• <b>Forehead Thermometer</b></li> <li>• <b>Mercury Thermometer</b></li> <li>• <b>Temporal Artery Thermometer</b></li> </ul>	<p>Displays the measurement method that was received from the integrated system.</p> <p>When the record is received electronically, the measurement method that is displayed might be different to the measurement method for</p>

Field	Mandatory	When manually created	When received from integrated systems
			manually created body temperature records.

## Heart Rate data

The table lists the fields that are displayed on a heart rate record.

Field	Mandatory	When manually created	When received from integrated systems
Heart Rate	Yes	<p>Displays the following values that were created:</p> <ul style="list-style-type: none"> <li>• <b>Heart Rate</b></li> <li>• <b>Units (Bpm)</b></li> </ul>	<p>Displays the data that is received from the integrated system. This could be one or any combination of the following:</p> <ul style="list-style-type: none"> <li>• Comparator (&lt; &gt; = )</li> <li>• Value</li> <li>• Unit</li> <li>• Value String</li> </ul> <p>For example, if a record has a comparator (=) and a value string (90 bpm). the Heart Rate field displays = 90 bpm.</p> <p>If Watson™ Care Manager receives a value string without a comparator, the Heart Rate field displays only value. For example, 90 bpm.</p>

Field	Mandatory	When manually created	When received from integrated systems
Measurement Method	No	<p>Displays one of the following values:</p> <ul style="list-style-type: none"> <li>• <b>Auscultation</b></li> <li>• <b>EKG</b></li> <li>• <b>Palpation</b></li> </ul>	<p>Displays the measurement method that was received from the integrated system.</p> <p>When the record is received electronically, the measurement method that is displayed might be different to the measurement method for manually created body heart rate records.</p>

## Height data

The table lists the fields that are displayed on a height record.

Field	Mandatory	When manually created	When received from integrated systems
Height	Yes	<p>Displays the following values that were created:</p> <ul style="list-style-type: none"> <li>• <b>Height</b></li> <li>• <b>Units</b> (Inches or cm)</li> </ul>	<p>Displays the data that is received from the integrated system. This could be one or any combination of the following:</p> <ul style="list-style-type: none"> <li>• Comparator (&lt; &gt; = )</li> <li>• Value</li> <li>• Unit</li> <li>• Value String</li> </ul> <p>For example, if a record has a comparator (&lt;, ) a value, (65) and a unit</p>

Field	Mandatory	When manually created	When received from integrated systems
			(Inches), the Height field displays <65 Inches.  If WCM receives a value without a unit, the Heart Rate field displays only the value. For example, 65.

## Oxygen Saturation data

The table lists the fields that are displayed on an oxygen saturation record.

Field	Mandatory	When manually created	When received from integrated systems
Oxygen Saturation	Yes	<p>Displays the following values that were created:</p> <ul style="list-style-type: none"> <li>• <b>Oxygen Saturation</b></li> <li>• <b>Units (%)</b></li> </ul>	<p>Displays the data that is received from the integrated system. This could be one or any combination of the following:</p> <ul style="list-style-type: none"> <li>• Comparator (&lt; &gt; = )</li> <li>• Value</li> <li>• Unit</li> <li>• Value String</li> </ul> <p>For example, if a record has a comparator (&lt;), a value (92) and a unit (%), the Oxygen Saturation field displays &lt;92 %.</p> <p>If WCM receives a comparator, a unit, and no</p>

Field	Mandatory	When manually created	When received from integrated systems
			value, the Oxygen Saturation field displays only the comparator and unit. For example, < %.

## Respiratory rate data

The table lists the fields that are displayed on a respiratory rate record.

Field	Mandatory	When manually created	When received from integrated systems
Respiratory Rate	Yes	<p>Displays the following values that were created:</p> <ul style="list-style-type: none"> <li>• <b>Respiratory Rate</b></li> <li>• <b>Units (bpm)</b></li> </ul>	<p>Displays the data that is received from the integrated system. This could be one or any combination of the following:</p> <ul style="list-style-type: none"> <li>• Comparator (&lt; &gt; = )</li> <li>• Value</li> <li>• Unit</li> <li>• Value String</li> </ul> <p>For example, if a record has a value (28) and a unit (bpm), the Respiratory Rate field displays =28 bpm.</p> <p>If Watson Care Manager receives a value without a unit, the Respiratory Rate field displays on-</p>

Field	Mandatory	When manually created	When received from integrated systems
			ly the value. For example, <a href="#">28</a> .

## Waist Circumference data

The lists the fields that are displayed on a waist circumference record.

Field	Mandatory	When manually created	When received from integrated systems
Waist Circumference	Yes	<p>Displays the following values that were created:</p> <ul style="list-style-type: none"> <li>• <b>Waist Circumference</b></li> <li>• <b>Units</b> (Inches or cm)</li> </ul>	<p>Displays the data that is received from the integrated system. This could be one or any combination of the following:</p> <ul style="list-style-type: none"> <li>• Comparator (&lt; &gt; = )</li> <li>• Value</li> <li>• Unit</li> <li>• Value String</li> </ul> <p>For example, if a record has a comparator (&gt;), a value (<a href="#">102</a>) and a unit (<a href="#">cm</a>), the Waist Circumference field displays <a href="#">&gt;102 cm</a>.</p> <p>If Watson™ Care Manager receives a value without a unit, the Waist Circumference field displays only the value. For example, <a href="#">102</a>.</p>

## **Waist-to-Height Ratio data**

The table lists the fields that are displayed on a waist-to-height record.

Field	Mandatory	When manually created	When received from integrated systems
Waist-to-Height Ratio	Yes	Displays the waist-to-height ratio measurement that was created.	Displays the waist-to-height ratio measurement that was received from the integrated system.

## **Weight data**

The table lists the fields that are displayed on a weight record.

Field	Mandatory	When manually created	When received from integrated systems
Weight	Yes	<p>Displays the following values that were entered:</p> <ul style="list-style-type: none"> <li>• <b>Weight</b></li> <li>• <b>Units</b> (Pounds or Kilos)</li> </ul>	<p>Displays the data that is received from the integrated system. This could be one or any combination of the following:</p> <ul style="list-style-type: none"> <li>• Comparator (&lt; &gt; = )</li> <li>• Value</li> <li>• Units</li> <li>• Value String</li> </ul> <p>For example, if a record has a comparator (&lt; ), a value (169), and a unit (Pounds), the Weight field displays &lt;169 Pounds.</p> <p>If Watson™ Care Manager receives a compara-</p>

Field	Mandatory	When manually created	When received from integrated systems
			tor, and a value without a unit, the Weight field displays only the comparator and value. For example, <169.

## Care team actions data

Care team actions can be manually created and received from third-party applications. The table shows the available care team action data, whether the data is mandatory, and the differences in the data displayed when a care team action is manually created or received from third-party applications.

### Common patterns for care team actions data

If a care team action is manually created or received from a third-party application, you can edit the action, update its progress and associate it with goals and barriers. Some care team action data is not received from integrated systems. You must edit the action to add these details.



#### Important:

You can manually modify care team actions data. If a care team action is modified in a third-party application, the corresponding record in Watson™ Care Manager updates.

If you modify a care team action that was received from a third-party application by editing, assigning, or completing the action, Watson™ Care Manager becomes the system of record for the care team action, and Watson™ Care Manager no longer receives updates to the care team action from the third-party application.

However, if you maintain progress or goals for a care team action that was received from another system, Watson™ Care Manager continues to receive updates to the action from the third-party application.

### General goal

When Watson™ Care Manager receives a care team action from a third-party application, by default, it creates a goal named **General** and associates the action with that goal. If the third-party application sends additional actions relating to the same client, Watson™ Care Manager associates each new action with the **General** goal.

You can remove care team actions from the **General** goal. However, you must first associate the care team action with another goal on the care plan. If all care team actions are removed from the **General** goal, you can delete the goal if you wish.

You cannot edit the **General** goal, update client progress for the goal, or associate a **General** goal with programs, actions, services, or barriers.

### Care team actions view

You can view care team actions on multiple pages in the application. For example, care team actions are displayed on a client's care plan and on the Care Team Actions list page. This topic focuses only on care team action details that you see on a care team action home page.

View a care team action home page by clicking **Care Plan > Care Team Actions** on the client's **Summary** view. You see a list of the client's care team actions. Click the name of an action to view the care team action home page.



#### Important:

If a role is specified in a care team action from a third-party application, the action is assigned to all care team members with that role. If no role is specified, the action is assigned to the primary care team member for the client. If there are multiple primary care team members, the action is assigned to the most recent primary care team member. If there is no primary care team member, the care team action is assigned to the first role based on alphabetical order of the available roles.

The table lists the fields that are displayed on a care team action home page.

Field	Mandatory	When manually created	When received from integrated systems
Care Team Action Name	Yes	Displays the name of the care team action	As per manually created records. The integrated system identifies the care team action name by its external system reference.  When the record is received electronically, the care team action names

Field	Mandatory	When manually created	When received from integrated systems
			that are displayed might be different to the care team action names for manually created goal records.
Source	Yes	Displays the source of the care team action that was selected from a configured list.	Displays the source of the care team action as received from the integrated system. The integrated system identifies the source by its external system reference.
Original Source System	No	<p>Displays the original source system where the care team action originated that was selected from a configured list.</p> <p>The following default values are available for selection:</p> <ul style="list-style-type: none"> <li>• Watson™ Care Manager</li> <li>• Other</li> </ul>	Displays the original source system where the care team action originated as received from the integrated system. The integrated system identifies the original source system by its external system reference.
Assigned To	Yes (Manually created actions only)	Displays the care team member's name or the care team role that the action is assigned to.	Displays the care team member's name or the care team role that the action is assigned to. The integrated system identifies the role by its external system reference.

Field	Mandatory	When manually created	When received from integrated systems
			<p>If a role is specified in a care team action from a third-party application, the action is assigned to all care team members with that role. If no role is specified, the action is assigned to the primary care team member for the client.</p> <p>If there are multiple primary care team members, the action is assigned to the most recently added primary care team member. If there is no primary care team member, the care team action is assigned to the first role based on alphabetical order of the available roles.</p>
Category	Optional	Displays the selected category for the action.	If received from an integrated system, it must be one of the configured categories.
Added On	Not applicable.	<p>This field is automatically populated by Watson™ Care Manager.</p> <p>Displays the date that the care team action was added.</p>	<p>Displays the date that the care team action was created in Watson™ Care Manager.</p> <p>By default, Watson™ Care Manager displays</p>

Field	Mandatory	When manually created	When received from integrated systems
			<p>by <b>System User</b> to indicate that the care team action was received from an integrated system.</p> <p>If your organization configures a different value to be displayed, for example, the name of an individual or organization, that value is displayed.</p>
Added Reason	Optional	Displays the reason that the care team action was added to the plan.	<p>Not applicable.</p> <p>This data is not received from integrated systems.</p>
Start Date	No	Displays start date for the care team action.	Displays start date for the care team action as received from the integrated system.
Expected End Date	No	Displays expected end date for the care team action.	Displays expected end date for the care team action as received from the integrated system.
Added By	No	<p>This field is automatically populated by Watson™ Care Manager.</p> <p>Displays the name of the user who added the care team action.</p>	<p>Displays <b>System User</b> to indicate that the care team action was received from an integrated system.</p> <p>If your organization configures a different val-</p>

Field	Mandatory	When manually created	When received from integrated systems
			ue to be displayed, for example, the name of an individual or organization, that value is displayed.
Status	No	This field is automatically populated by Watson™ Care Manager based on the outcome of the care team action. Displays one of the following statuses: <ul style="list-style-type: none"><li>• <b>Current</b></li><li>• <b>Planned</b></li><li>• <b>Overdue</b></li><li>• <b>Completed</b></li></ul>	As per manually created records.
References	No	Displays hyperlinks to external web sites for supplementary reference information, if configured.	Not applicable. This data is not received from integrated systems.
Completed On	No	Displays the care team action completion date.	Displays completed date for the care team action as received from the integrated system.
Outcome	No, as received via API	Displays one of the following outcomes: <ul style="list-style-type: none"><li>• <b>Successful</b></li><li>• <b>Not Successful</b></li><li>• <b>Abandoned</b></li></ul>	Displays the outcome for the care team action as received from the integrated system.

Field	Mandatory	When manually created	When received from integrated systems
Comment	Optional, as received via API		
Completed By	Not applicable	<p>This field is automatically populated by Watson™ Care Manager.</p> <p>Displays the name of the user who completed the care team action.</p>	<p>Displays by <b>System User</b> to indicate that the care team action was received from an integrated system.</p> <p>If your organization configures a different value to be displayed, for example, the name of an individual or organization, that value is displayed.</p>

## Configurable client data

Client data that is captured in respect of data types that are configured by your administrator can be manually recorded in Watson™ Care Manager and shared between external systems and Watson™ Care Manager via an API.

By receiving client data records captured in respect of configurable client data types from external systems, the latest version of the data becomes automatically available in Watson™ Care Manager and does not need to be manually recorded by care teams.



### Important:

Before Watson™ Care Manager can receive client data records captured in respect of configurable client data types from external systems, the data type must be configured and activated by your administrator. Then, your administrator must complete the tasks in the following topic: [Sharing client data types with external systems \(on page 188\)](#).



### Note:

The exact information that is shared between Watson™ Care Manager and external systems in respect of configured client data depends on the attributes your administrator configures for the



client data type. For more information, see [Configuring metadata for client data types \(on page 382\)](#).

## Common patterns for configurable client data

In general, if a client data record that corresponds to a configured client data type is modified or deleted in an external system, the corresponding record in Watson™ Care Manager updates. However, if the care team modifies a client data record that was received from an external system, Watson Care Manager becomes the system of record for the data, and Watson™ Care Manager no longer receives updates to the record from the external system.

## Assessments data

Client assessments can be manually run by care teams and a client's *Completed* assessments can be sent and received between Watson™ Care Manager and third-party applications (through the Assessments API).

## Common patterns for assessments data

By sending assessments between Watson™ Care Manager and third-party applications, the latest version of the client's assessment information becomes available in all applications so that care teams do not need to manually record it. Watson™ Care Manager sends and receives Script and Score Only assessments for active and inactive clients. Watson™ Care Manager does not send or receive a client's in progress assessments, or assessments for deleted clients..



### Note:

Before Watson™ Care Manager can send and receive client assessment data from third-party applications, the assessment must be configured, activated, and associated with one or more programs. Then, your administrator must share the assessment by completing the tasks in [Sharing questionnaires with external systems \(on page 76\)](#).

Completed assessments that are sent to Watson™ Care Manager through the API can optionally be associated with a program. Assuming the client is associated with that program, care teams can run new instances of the received assessments and repeat the assessments.

**Table 21. Assessment behavior when associated with a program**

Is the received assessment associated with program?	Assessment behavior
Yes	<p>Watson™ Care Manager matches the program external system reference (ESR) that is sent via the API with a configured program and checks if the client is associated with the program.</p> <ul style="list-style-type: none"> <li>If the program ESR does not match a configured program, the assessment is not received from the external system.</li> <li>If the program ESR matches a configured program and the client is associated with the program, Watson™ Care Manager completes or repeats the assessment in the context of each program. <b>Note:</b> The program must be in the Assigned, Enrolled, or Pending status.</li> <li>If the program ESR matches a configured program, but the client is not associated with the program in Watson™ Care Manager, Watson™ Care Manager completes or repeats a standalone assessment.</li> </ul>
No	<ul style="list-style-type: none"> <li>Watson™ Care Manager checks if the client has one or more programs that are already associated with the assessment in application. Depending on the program status (Assigned, Enrolled, or Pending), Watson™ Care Manager completes or repeats the received assessment for the most recent program.</li> <li>If the client has no programs to associate the assessment with, Watson™ Care Manager creates a completed standalone assessment</li> </ul>

If a received assessment already exists for the client in Watson™ Care Manager, Watson™ Care Manager repeats the existing assessment when received through the API. Watson™ Care Manager appends the repeated assessment to the original assessment. If no assessment exists for the client, Watson™ Care Manager adds the new assessment. If an in progress assessment of the same type already exists, Watson™ Care Manager adds the new assessment and the in progress assessment remains unaffected.

When Watson™ Care Manager receives an assessment through the API, any care plan activities, tasks, and suggestions that are configured for the questionnaire in Administration are automatically added and linked to the most recently updated program. In addition, when received from an external application,

historical versions of assessments are displayed in Watson™ Care Manager based on the Display History Across Programs setting that is configured for the assessment by your Administrator.

To see the assessment data that is sent from Watson™ Care Manager to third-party applications for a configured assessment through the Assessments API, your Administrator must download its API document by [Sharing the API document for an assessment \(on page 49\)](#).

## Assessments data view

You can view a client's assessment data in Watson™ Care Manager by clicking **Programs > Assessments** from the client's **Summary** view. By clicking the assessment name, you see the home page for each assessment.

The table lists the columns and fields on the **Assessments** page that display data for an assessment record.

Column/field	Mandatory	When manually created	When received from integrated systems
Name	Yes	Displays the name of the assessment. Clicking the assessment name displays more assessment details.	As per manually created records. The third-party application identifies the assessment name by its external system reference.
Assessed	Not applicable.	This column is automatically populated by Watson™ Care Manager  Displays the date and time that the assessment was completed in the third-party application, and the name or username of the person who completed the assessment (as received via the API).	Displays the date and time that the assessment was completed in the third-party application, and the name or username of the person who completed the assessment (as received via the API).
Type	Yes	Displays one of the following assessment types:	As per manually created records.

Column/field	Mandatory	When manually created	When received from integrated systems
		<ul style="list-style-type: none"> <li>• Script</li> <li>• Score Only</li> </ul>	
Status	Yes	<p>Displays one of the following statuses:</p> <ul style="list-style-type: none"> <li>• Completed</li> <li>• In Progress</li> </ul>	Displays <b>Completed</b> .
Measure	Yes	Displays the name of the configured measure that was assessed.	<p>As per manually created records. The integrated system identifies the measure name by its external system reference.</p>
Classification	Yes	Displays the name of the configured classification achieved by the client based on their assessment score.	<p>As per manually created records.</p> <p>The classification is not received from third-party applications.</p> <p>Watson™ Care Manager calculates the classification based on the configuration of the assessment in Administration and the client's assessment score.</p>
Score	Not applicable.	This column is automatically populated by Watson™ Care Manager. Displays the assessment score achieved by the	As per manually created assessments. Displays the assessment score achieved by the client

<b>Column/field</b>	<b>Mandatory</b>	<b>When manually created</b>	<b>When received from integrated systems</b>
		<p>client for each assessed measure.</p> <p>To calculate the total score, Watson™ Care Manager adds the scores achieved for each assessed measure.</p>	<p>for each assessed measure.</p> <p>Watson™ Care Manager calculates the total assessment score based on the score for each assessed measure and the configuration of the assessment in Administration.</p>
Date (Displayed only for score only assessments.)	No	This column is automatically populated by Watson™ Care Manager. Displays date that the assessment score was captured.	Displays the date that the assessment was completed in the third-party application.
Source	Yes	Displays the source of the assessment that was selected from the preconfigured list of sources.	Displays the source of the assessment that was received from the third-party application. The third-party application identifies the source by its external system reference.
Original Source System	No	Displays the original source system where the assessment originated that was selected from the preconfigured list of original source systems.	Displays the original source system where the assessment originated. The third-party application identifies the source system by its external system reference.

Column/field	Mandatory	When manually created	When received from integrated systems
Started	Not applicable	This field is automatically populated by Watson™ Care Manager.  Displays the date and time that the assessment was started and the name of the user who started the assessment.	Displays the date and time that the assessment was completed in the third-party application, and the name or username of the person who completed the assessment (as received via the API).
Completed	Not applicable	This field is automatically populated by Watson™ Care Manager.  Displays the date and time that the assessment was completed and the name of the user who completed the assessment.	Displays the date and time that the assessment was completed in the third-party application, and the name or username of the person who completed the assessment (as received via the API).

### Assessment home page data view

You can see the home page for each assessment by clicking an assessment name on the Assessments page. Most of the data that is displayed on the home page is the same as the data that is displayed on the Assessments page. However, question and answer data for assessments with a script assessment is available only the assessment home page.

The table lists the columns on an assessment home page that displays extra data for a script assessment.

Column	Mandatory	When manually created	When received from integrated systems
Question	Yes	Displays a question asked in relation to a	As per manually created.

Column	Mandatory	When manually created	When received from integrated systems
		specific assessment measure.	
Answer	Yes	Displays the client's answer to the question asked in relation to a specific measure.	As per manually created.


**Note:**

Notes and attachments data for assessments is also displayed on the assessment home page. This data is not received from third-party applications. However, care teams can manually add notes and attachments to assessments that are received via the API, if needed. The assessment home page also included a history of all assessments that are run.

## Questionnaires data

Client questionnaires can be manually run by care teams and a client's *Completed* questionnaires can be sent and received between Watson™ Care Manager and third-party applications (through the Questionnaires API).

### Common patterns for questionnaires data

By sending questionnaires between Watson™ Care Manager and third-party applications, the latest version of the client's questionnaire information becomes available in all applications so that care teams do not need to manually record it. Watson™ Care Manager sends and receives questionnaires for active and inactive clients. Watson™ Care Manager does not send or receive a client's in progress questionnaires or questionnaires for deleted clients.


**Note:**

Before Watson™ Care Manager can send and receive client questionnaire data from third-party applications, the questionnaire must be configured, activated, and associated with one or more programs. Questionnaires that are received from other applications are applied to a client's record *only* if each questionnaire is associated with a program and the client is associated with that program. Then, your administrator must share the questionnaire by completing the tasks in [Sharing questionnaires with external systems \(on page 76\)](#).

Completed questionnaires that are sent to Watson™ Care Manager through the API can optionally be associated with a program. Assuming the client is associated with that program, care teams can run new instances of the questionnaires and repeat those questionnaires.

**Table 22. Questionnaire behavior when associated with a program**

Is the received questionnaire associated with program?	Questionnaire behavior
Yes	<p>Watson™ Care Manager matches the program external system reference (ESR) that is sent via the API with a configured program and checks if the client is associated with the program.</p> <ul style="list-style-type: none"> <li>• If the program ESR does not match a configured program, Watson™ Care Manager does not receive the questionnaire.</li> <li>• If the program ESR matches a configured program and the client is associated with the program, Watson™ Care Manager completes or repeats the questionnaire in the context of each program. <b>Note:</b> The program must be in the Assigned, Enrolled, or Pending status.</li> <li>• If the program ESR matches a configured program, but the client is not associated with the program in Watson™ Care Manager, Watson™ Care Manager does not receive the questionnaire.</li> </ul>
No	<ul style="list-style-type: none"> <li>• Watson™ Care Manager checks if the client has one or more programs that are already associated with the questionnaire in the application. Depending on the program status (Assigned, Enrolled, or Pending), Watson™ Care Manager completes or repeats the received questionnaire for the most recent program.</li> <li>• If the client has no programs to associate the questionnaire with, Watson™ Care Manager does not receive questionnaire.</li> </ul>

If a received questionnaire already exists for the client in Watson™ Care Manager, Watson™ Care Manager repeats the existing questionnaire when received through the API. Watson™ Care Manager appends the repeated questionnaire to the original questionnaire. If no questionnaire exists for the client, Watson™ Care Manager adds the new questionnaire.

If an in progress questionnaire of the same type already exists, Watson™ Care Manager adds the new questionnaire and the in progress questionnaire remains unaffected.

When Watson™ Care Manager receives a questionnaire, any care plan activities, tasks, and suggestions that are configured for the questionnaire are automatically added and linked to the most recently updated program. In addition, when received from an external application, historical versions of questionnaires are displayed in Watson™ Care Manager based on the Display History in Program (Days) setting that is configured for the questionnaire by your Administrator.

To see the questionnaire data that is sent from Watson™ Care Manager to third-party applications for a configured questionnaire through the Questionnaires API, your Administrator must download its API document by [Sharing the API document for a questionnaire \(on page 77\)](#).

## Questionnaire data view

You can view a client's questionnaire from their **Summary** view.

1. Click **Programs > Programs > <program name>**. You see the contents of the program. Related questionnaires are grouped into modules.
2. Click a module, then click the name of a questionnaire to display it on page.
3. Click **Details** to see the full details of the questionnaire.

The table lists the data that displays for a questionnaire record.

Data	Mandatory	When manually created	When received from integrated systems
Questionnaire name	Yes	Displays the name of the questionnaire.	As per manually created records. The third-party application identifies the questionnaire name by its external system reference.
Assessed	Not applicable	This data is automatically populated by Watson™ Care Manager  Displays the date and time that the questionnaire was completed	Displays the date and time that the questionnaire was completed in the third-party application, and the name or username of the person who completed the

Data	Mandatory	When manually created	When received from integrated systems
		naire was started or completed.	questionnaire (as received via the API).
Started	Not applicable	This field is automatically populated by Watson™ Care Manager.  Displays the date and time that the questionnaire was started and the name of the user who started the questionnaire.	Displays the date and time that the questionnaire was completed in the third-party application, and the name or username of the person who completed the questionnaire (as received via the API).
Completed	Not applicable	This field is automatically populated by Watson™ Care Manager.  Displays the date and time that the questionnaire was completed and the name of the user who completed the questionnaire.  <b>Note:</b> If the questionnaire is in progress, no value displays.	Displays the date and time that the questionnaire was completed in the third-party application, and the name or username of the person who completed the questionnaire (as received via the API).
Description	Not applicable	This field is automatically populated by Watson™ Care Manager Displays a description of the questionnaire (if configured in Administration).	As per manually created.
Original Source System	No	Displays the original source system where	Displays the original source system where

Data	Mandatory	When manually created	When received from integrated systems
		the questionnaire originated that was selected from the preconfigured list of original source systems.	the questionnaire originated. The third-party application identifies the source system by its external system reference.
Source	Yes	Displays the source of the questionnaire that was selected from the preconfigured list of sources.	Displays the source of the questionnaire that was received from the third-party application. The third-party application identifies the source by its external system reference.
Question	Yes	Displays a question asked in the questionnaire.	As per manually created.
Answer	Yes	Displays the client's answer to the question asked.	As per manually created.

## Notes data

Client notes data can be manually created, received, and shared only with third-party applications. The table shows the available notes data, whether the data is mandatory, and the differences in the data when it is manually created or received from third-party applications.

### Client notes

You can view notes that are manually created and received from integrated systems by clicking **History > Notes** on a client's **Summary** view.



#### Note:

You can update manually created notes. However, notes from integrated systems cannot be manually modified in Watson™ Care Manager. In addition, Watson™ Care Manager does not receive updates to notes from integrated systems. You can delete notes that are manually



created and notes that are received from integrated systems. If the note record is deleted in the integrated system, the note status of the corresponding record in Watson™ Care Manager changes to **Canceled**.

The table lists the columns and fields that display notes data on a note record.



**Note:**

Some fields are displayed only when the note type is a touchpoint.

Column/Field	Mandatory	When manually created	When received from integrated systems
Subject	Yes  (Manually created records only.)	Displays the subject of the note.	As per manually created records.
Note	Yes	Displays the note text.	As per manually created records.
Type	Yes	<p>Displays one of the following default note types, or a note type that is configured by your organization:</p> <ul style="list-style-type: none"> <li>• <b>Access and Continuity</b></li> <li>• <b>Assessment</b></li> <li>• <b>Care Management</b></li> <li>• <b>Care Plan Update</b></li> <li>• <b>Comprehensive Assessment</b></li> <li>• <b>Comprehensiveness and Coordination</b></li> <li>• <b>Educational Information</b></li> </ul>	<p>As per manually created records.</p> <p>If the integrated system has different note types, Watson™ Care Manager maps each type to one of the default types or a note type that is configured by your organization.</p>

Column/Field	Mandatory	When manually created	When received from integrated systems
		<ul style="list-style-type: none"> <li>• General</li> <li>• Letters</li> <li>• Population</li> <li>• Health</li> <li>• Private</li> <li>• Private to Role</li> <li>• Quality Review</li> <li>• Touchpoint</li> <li>• Wellness</li> </ul>	
Status	No	<p>Depending on whether the note type is configured to be editable, displays one of the following statuses:</p> <ul style="list-style-type: none"> <li>• Draft</li> <li>• Ready for Review</li> <li>• Final</li> <li>• Canceled</li> </ul> <p>If the note type is not configured to be editable, the status is <b>Final</b>.</p>	<p>Displays <b>Final</b> when the note record came from an integrated system.</p> <p>Displays <b>Canceled</b> when the corresponding note is deleted.</p>
Comments	Not applicable	<p>This column is automatically populated by Watson™ Care Manager.</p> <p>Displays the number of comments that are added to a note.</p>	<p>Not applicable.</p> <p>This column is automatically populated by Watson™ Care Manager</p>
Latest Update	Yes	This column is automatically populated by Watson™ Care Manager	Displays the date and time that the note or

Column/Field	Mandatory	When manually created	When received from integrated systems
	(When received from an integrated system only.)	Displays the date and time that the note or touchpoint was last updated and the name of the user who made the update.	<p>touchpoint was received.</p> <p>In addition, displays the username associated with the organization's API account or the name of the user who added the note in the external system.</p> <p>If a username is received, Watson™ Care Manager checks that the username is associated with a valid Watson™ Care Manager account and displays the user's full name in Watson™ Care Manager. Otherwise, the value received is displayed.</p>
Duration	No	Displays how long the client activity is expected to take, in minutes.	As per manually created records.
Comment	No	Displays comments added to the note or <b>No Records</b> if a note has no associated comments.	<p>Displays comments associated with the notes received from the integrated system.</p> <p>If a note that was received from an integrated system is later deleted in the integrated system, this field is auto-</p>

Column/Field	Mandatory	When manually created	When received from integrated systems
			Automatically populated by Watson™ Care Manager with <b>Canceled by an external system</b> .
Deletion Reason  (This field is displayed in the user interface for all note types except Touchpoint.)	Yes  (Manually created records only.)	Displays one of the following deletion reasons: <ul style="list-style-type: none"><li>• <b>Care Manager request</b></li><li>• <b>Entered for incorrect client</b></li><li>• <b>Incorrect Information</b></li><li>• <b>Other</b></li></ul>	Not applicable.  This field is automatically populated by Watson™ Care Manager.  Displays <b>Other</b> to indicate that the record came from an integrated system.
Date  (Displayed only for associated comments.)	Yes  (When received from an integrated system only.)	This column is automatically populated by Watson™ Care Manager.  Displays the date and time the comment was added to the note.	Displays the date and time that the comment was added to the note.
Added by  (Displayed only for associated comments.)	Yes  (When received from an integrated system only.)	This column is automatically populated by Watson™ Care Manager.  Displays the name of the user who added the comment to the note.	Displays the username associated with the organization's API account or the name of the user who added the comment to the note in the external system. If a username is received, Watson™ Care Manager checks that the username is associated with

Column/Field	Mandatory	When manually created	When received from integrated systems
			a valid Watson™ Care Manager account and displays the user's full name in Watson™ Care Manager. Otherwise, the value received is displayed.
Updated	Yes  (When received from an integrated system only.)	This column is automatically populated by Watson™ Care Manager.  Displays the date and time that the note or touchpoint was updated and the name of the user who made the update.	Displays the date and time that the note or touchpoint was updated.  By default, Watson™ Care Manager displays <b>by System User</b> to indicate that the update was received from an integrated system.  If your organization configures a different value to be displayed, for example, the name of an individual or organization, that value is displayed.
Contact Date  (Displayed only for Touchpoint note types.)	Yes	Displays the contact date for the touchpoint.	Displays the contact date for the touchpoint.
Contact With  (Displayed only for Touchpoint note types.)	Yes  (Manually created records only.)	Displays one or more of the following people who were interacted with during the touchpoint:	Displays one or more of the following: <ul style="list-style-type: none"><li>• <b>Care Giver</b></li><li>• <b>Care Team</b></li></ul>

Column/Field	Mandatory	When manually created	When received from integrated systems
		<ul style="list-style-type: none"> <li>• <b>Care Giver</b></li> <li>• <b>Care Team</b></li> <li>• <b>Client</b></li> <li>• <b>Family Member</b></li> <li>• <b>Medical</b></li> <li>• <b>Other</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Client</b></li> <li>• <b>Family Member</b></li> <li>• <b>Medical</b></li> <li>• <b>Other</b></li> </ul> <p>If the integrated system has different values, Watson™ Care Manager maps each value to one of these values.</p>
Direction (Displayed only for Touchpoint note types.)	Yes  (Manually created records only.)	<p>Displays one of the following directions:</p> <ul style="list-style-type: none"> <li>• <b>Outbound</b></li> <li>• <b>Inbound</b></li> </ul>	<p>Displays one of the following directions:</p> <ul style="list-style-type: none"> <li>• <b>Outbound</b></li> <li>• <b>Inbound</b></li> </ul> <p>If the integrated system has different directions, Watson™ Care Manager maps each direction to one of these directions.</p>
Validated Identity (Displayed only for Touchpoint note types.)	No	Indicates whether the identity of the person who was contacted was validated.	As per manually created records.
Method (Displayed only for Touchpoint note types.)	Yes  (Manually created records only.)	<p>Displays one of the following methods:</p> <ul style="list-style-type: none"> <li>• <b>Email</b></li> <li>• <b>Face to Face</b></li> <li>• <b>Home</b></li> <li>• <b>Face to Face</b></li> <li>• <b>Home</b></li> </ul>	<p>Displays one of the following methods:</p> <ul style="list-style-type: none"> <li>• <b>Email</b></li> <li>• <b>Face to Face</b></li> <li>• <b>Home</b></li> <li>• <b>Face to Face</b></li> <li>• <b>Home</b></li> </ul>

Column/Field	Mandatory	When manually created	When received from integrated systems
		<ul style="list-style-type: none"> <li>• Face to Face Other</li> <li>• Mail</li> <li>• Other</li> <li>• Phone</li> <li>• Text</li> </ul>	<ul style="list-style-type: none"> <li>• Face to Face Other</li> <li>• Mail</li> <li>• Other</li> <li>• Phone</li> <li>• Text</li> </ul> <p>If the integrated system has different methods, Watson™ Care Manager maps each method to one of these methods.</p>
Outcome (Displayed only for Touchpoint note types.)	Yes (Manually created records only.)	<p>Displays one of the following outcomes:</p> <ul style="list-style-type: none"> <li>• Successful</li> <li>• Unsuccessful</li> </ul>	<p>Displays one of the following outcomes:</p> <ul style="list-style-type: none"> <li>• Successful</li> <li>• Unsuccessful</li> </ul> <p>If the integrated system has different outcomes, Watson™ Care Manager maps each outcome to one of these outcomes.</p>
Program(s) (Displayed only for Touchpoint note types.)	No	Displays one or more programs associated with the touchpoint.	<p>As per manually created records.</p> <p>If the integrated system has different programs, Watson Care Manager maps each program to one of the configured programs.</p>
Share	No	Displays whether the note can be shared.	Not applicable.

Column/Field	Mandatory	When manually created	When received from integrated systems
			This data is not received from integrated systems.
Share With	No	Displays the external system the note can be shared with.	Not applicable.  This data is not received from integrated systems.
Source	Yes	Displays the source of the note that was selected from a configured list.	Displays the source of the note as received from the integrated system.  The integrated system identifies the source by its external system reference.
Original Source System	No	Displays the original source system where the note originated that was selected from a configured list.  The following default values are available for selection: <ul style="list-style-type: none"><li>• Watson™ Care Manager</li><li>• Other</li></ul>	Displays the name of the original source system where the note originated as received from the integrated system.  The integrated system identifies the original source system by its external system reference.

## Alerts data

Alerts that you are notified about can be manually created and can be received from third-party applications. The table shows the available alerts data, whether the data is mandatory, and the differences in the data when it is manually created or received from third-party applications.

### Alert data views

Alerts for a client are shown in the context pane. You can view all alerts for a client by clicking **History > Alerts** on the client's **Summary** view. From the **Care Manager Workspace**, you can see a list of all alerts you were notified about by clicking the **Side Navigation Menu**, then clicking **Alert Notifications**.



#### Note:

You can modify open alerts. An alert priority, is read-only when the alert came from an integrated system. If the alert is modified or closed in the integrated system, the corresponding Watson™ Care Manager alert record is updated. You can comment on alerts and close alerts.



#### Important:

If a role is specified in an alert from a third-party application, all care team members with that role are notified of the alert. If no role is specified, or a role is specified but no care team members fulfill that role, all primary care members for the client are notified. Otherwise, no one is notified of the alert.

The table lists the columns on the **My Alerts** and the **Alerts** pages that display alert data.

Column	Mandatory	When manually created	When received from integrated systems
Client (Displayed only on the <b>My Alerts</b> page)	Yes	Displays the name of the client who the alert relates to.	As per manually created records.
Name	Yes	Displays the name of the alert.	As per manually created records. The integrated system identifies the alert name by its external system reference.

Column	Mandatory	When manually created	When received from integrated systems
Priority	Yes	Displays one of the following default priorities: <ul style="list-style-type: none"><li>• <b>Critical</b></li><li>• <b>High</b></li><li>• <b>Medium</b></li><li>• <b>Low</b></li></ul>	As per a manually created alert. Depending on the priority status that was received from the integrated system, displays <b>Critical</b> , <b>High</b> , <b>Medium</b> , or <b>Low</b> .
Source	Yes	Displays the source of the alert that was selected from a configured list of sources.	Displays the source of the alert that was received from the integrated system. The integrated system identifies the source by its external system reference.
Original Source System	No	Displays the original source system where the alert originated that was selected from a configured list of original source systems.	Displays the original source system where the alert originated. The integrated system identifies the source system by its external system reference.
Created	Yes  (When received from an integrated system only.)	This column is automatically populated by Watson™ Care Manager.  Displays the date and time that the alert was created, and the name of the care team member who created the alert.	Displays the date and time that the alert was created in Watson™ Care Manager.  By default, Watson™ Care Manager displays the text <b>by System User</b> to indicate that the alert was received from an integrated system.

Column	Mandatory	When manually created	When received from integrated systems
			If your organization configures a different value to be displayed, for example, the name of an individual or organization, that value is displayed.
Closed	Yes	<p>This column is automatically populated by Watson™ Care Manager.</p> <p>Displays the date and time that the alert was closed, and the name of the care team member who closed the alert.</p>	<p>Displays the date and time that the alert was closed in Watson™ Care Manager.</p> <p>By default, Watson™ Care Manager displays the text <b>by System User</b> to indicate that the alert was closed by an integrated system.</p> <p>If your organization configures a different value to be displayed, for example, the name of an individual or organization, that value is displayed.</p>
Status	No	<p>This column is automatically populated by Watson™ Care Manager. Displays one of the following statuses:</p> <ul style="list-style-type: none"> <li>• <b>Open</b></li> <li>• <b>Closed</b></li> </ul>	<p>Displays one of the following statuses:</p> <ul style="list-style-type: none"> <li>• <b>Open</b></li> <li>• <b>Closed</b></li> </ul> <p>If Watson™ Care Manager does not receive a</p>

Column	Mandatory	When manually created	When received from integrated systems
			status, this column displays <b>Open</b> .
Comment	Yes	Displays a comment added by a care team member to the alert.	As per manually created records.
Added	Yes	This column is automatically populated by Watson™ Care Manager.  Displays the date and time that the comment was added to the alert and the name of the care team member who commented.	Displays the date and time that the comment was received in Watson™ Care Manager.  By default, Watson™ Care Manager displays the text <b>by System User</b> to indicate that the comment was received from an integrated system.  If your organization configures a different value to be displayed, for example, the name of an individual or organization, that value is displayed.
Care Team Member	No	Displays the name of the care team member who was notified of the alert.	As per manually created records.
Role	No	Displays the role of the care team member who was notified of the alert from the configured list of roles.	As per manually created records. The integrated system identifies the role by its external system reference

Column	Mandatory	When manually created	When received from integrated systems
			If a role is specified in an alert, all care team members with that role are notified of the alert.  If no role is specified, or a role is specified but no care team members fulfill that role, all primary care members for the client are notified. Otherwise, no one is notified of the alert.

## Referral data

Referral data can come from both internal sources and integrated systems. The tables show the referral data that is received from integrated systems, and the differences in the data when it is manually created or received.

### Referral data views

You can view referral data on multiple pages in the application. As a Supervisor, you view referral data on the **Open Unassigned Referrals** and **Open Assigned Referrals** pages. As a care team member, you view referral data on multiple pages, which include the **Referrals**, **Open Unassigned Referrals**, and **My Open Referrals** pages.

Referrals that are received from integrated systems are displayed on the **Open Unassigned Referrals** page where a Supervisor assigns them to a suitable care team member. In addition, a care team member can assign a referral to themselves. The **Open Unassigned Referrals** shows referrals for active and inactive clients.

Referrals from integrated systems that are in an **Open** status, and are not yet assigned to a care team member, can be updated by the originating integrated system.

The table lists the columns and fields on the Watson™ Care Manager pages that display referral data.

Column/field	Mandatory	When manually created	When received from integrated systems
Name  (This data is not displayed on the <b>Referrals</b> page.)	Yes	Displays the referred client's first name and last name.	Displays the referred client's first name and last name.
Referred On	Yes	Displays the date that the referral was manually created in the system.	Displays the date of the referral.
Referred From  (Displayed only on the <b>Referrals</b> page.)	No	When a client is referred between organization units, this is the name of the organization unit that referred the client.  This value is populated by the system and not entered by a user.	As per a manually created referral.
Referred To  (Displayed only on the <b>Referrals</b> page.)	No	When a client is referred between organization units, this is the name of the organization unit that the client was referred to.	As per a manually created referral.
Priority	Yes	Displays one of the following priority statuses:  Displays <b>Not Set</b> , <b>Low</b> , <b>Medium</b> , or	As per a manually created referral.  Displays <b>Not Set</b> , <b>Low</b> , <b>Medium</b> , or

Column/field	Mandatory	When manually created	When received from integrated systems
		<ul style="list-style-type: none"> <li>• Not Set</li> <li>• Low</li> <li>• Medium</li> <li>• High</li> </ul>	<p><b>High</b>, depending on the priority status that is received.</p> <p>By default, if the referral was received from IBM Explorers or IBM Phytel products, and the client was referred through multiple cohorts, Watson™ Care Manager displays the highest available priority status.</p>
Referral Reason	Yes	<p>Displays the reason for referring the client that was selected from a list of referral reasons configured by your Administrator.</p> <p>By default, a reason of Other is available for selection if one of the other reasons is not suitable.</p>	<p>Displays the reason that was received from the integrated system.</p> <p>If Watson™ Care Manager receives an external system reference for the referral reason, the referral reason is identified by its external system reference.</p>
Other Referral Reason	No	Displays the value entered when Other	Displays the value received if no external system refer-

<b>Column/field</b>	<b>Mandatory</b>	<b>When manually created</b>	<b>When received from integrated systems</b>
		is selected for the referral reason.	ence is received for the referral reason or if the external system reference received is associated with the default Other referral reason in Administration.
Source	Yes	If configured to be shown, displays the configured source of the referral.	<p>Displays the source of the referral that was received from the integrated system.</p> <p>When the record is received, the sources that are displayed might be different to the sources that are available for manually created referrals.</p>
Original Source System	No	If configured to be shown, displays the configured system where the referral originated.	<p>Displays the source system where the referral originated.</p> <p>When the record is received, the original source systems that are displayed might be different to the original</p>

Column/field	Mandatory	When manually created	When received from integrated systems
			source systems that are available for manually created referrals.
Suggested Program  Displayed only on the <b>Referrals</b> page.	No	Not applicable.	Displays the name of a suggested program to assign the client to.
Assigned To  Displayed only on the <b>Referrals</b> page.	No	Displays the name of the care manager who is assigned the referral.	Not applicable.  This data is not received from integrated systems.
Status  Displayed only on the <b>Referrals</b> page (Referrals History).	Yes	Displays one of the following referral statuses:  • Accepted • Rejected	Not applicable.  This data is not received from integrated systems.
Reason  Displayed only on the <b>Referrals</b> page (Referrals History).	Yes	Displays the reason for rejecting the referral or the reason the referral was unassigned, that was selected from the preconfigured list of reasons.  When a referral is rejected, displays	Not applicable.  This data is not received from integrated systems.

Column/field	Mandatory	When manually created	When received from integrated systems
		<p>one of the following reasons:</p> <ul style="list-style-type: none"> <li>• <b>Deceased</b></li> <li>• <b>Non responder</b></li> <li>• <b>Opt Out</b></li> <li>• <b>Other</b></li> </ul> <p>When a referral is unassigned, displays one of the following reasons:</p> <ul style="list-style-type: none"> <li>• <b>Assigned in error</b></li> <li>• <b>No capacity</b></li> <li>• <b>Unavailable</b></li> <li>• <b>Other</b></li> </ul>	
Other Reason Displayed only on the <b>Referrals</b> page (Referrals History).	Yes	Displays the reason for rejecting the referral or reassigning the referral, that was entered because none of the reasons in the preconfigured list were suitable for selection.	<p>Not applicable.</p> <p>This data is not received from integrated systems.</p>
Accepted On Displayed only on the <b>Referrals</b> page (Referrals History).	Yes	Displays the date that the referral was accepted for care management.	<p>Not applicable.</p> <p>This data is not received from integrated systems.</p>

Column/field	Mandatory	When manually created	When received from integrated systems
Date Displayed only on the <b>Referrals</b> page (Referrals History).	Yes	Displays the date that the referral was rejected for care management.	Not applicable.  This data is not received from integrated systems.
Comments	No	Displays comments relating to the referral.	Displays comments relating to the referral, if received.
Program (Displayed only on the <b>My Open Referrals</b> page.)	No	Displays the name of the program that was manually associated with the client.	No applicable.  This data is not received from integrated systems.

## Integrating via Watson™ Care Manager REST APIs

A REST API is a set of URL resources that you can use to integrate IBM Watson® Care Manager with external systems. Watson™ Care Manager APIs enable third-party applications to communicate with IBM Watson® Care Manager and access real-time data.

Watson™ Care Manager APIs are designed primarily to help developers manage REST API calls from outside the Watson™ Care Manager application. By using the protected APIs listed in the API Catalog section, you can sync external system data with the latest client-related data in Watson Care Manager. From an external system, you can create and update client-related data records in Watson Care Manager.



### Note:

Before you can access and use the protected APIs, certain information is required by Watson Care Manager to allow inbound and outbound flow of data between Watson™ Care Manager and third-party applications. For more information, see [Required information for API flows \(on page 412\)](#).

## Getting started with REST APIs

Start here if you're new to APIs, or you want a more comprehensive understanding of how to integrate with Watson™ Care Manager APIs. Otherwise, you can skip directly to the API Catalog that lists the protected APIs.

## API security and access

To access the Watson™ Care Manager REST API services and resources, you must have valid authorization permissions and be authenticated.

With IBM Cloud, you can directly connect to the Watson™ Care Manager API endpoints from any internet routable location (over TCP/IP). Assuming you can route from your location to the internet, and your network perimeter device is configured appropriately, Watson™ Care Manager can expose the API endpoints.



### Before you begin:

Before you can access API resources, Watson™ Care Manager requires certain information about your external system. In addition, Watson Care Manager may also need to share certain information with you. **Note:** You must agree the method of exchange for confidential information, like endpoints and certificates, with your IBM client executive at the time of engagement.

The IBM App ID service authorizes your access to the API resources. To achieve this, you must obtain tokens using App ID. In addition, mutual transport layer security (TLS) must be set up between your external system and Watson™ Care Manager so that the API calls are sent and received securely.

## Required information for API flows

Depending on the direction of the API flow (inbound or outbound), certain information is required to integrate your external system with Watson™ Care Manager.

### Required information for inbound API flow

For an inbound API flow from your external system to Watson™ Care Manager, you must configure a specific Watson™ Care Manager endpoint (URL) and port number in your application. Your client executive provides you with this information.

For inbound mutual TLS authentication purposes, you must provide a client certificate to Watson™ Care Manager that includes its public key, any parent intermediate certificates, and the parent public root certificate to store in our environment.

## Required information for outbound API flow

To enable an outbound API flow from Watson™ Care Manager to your external system, you must work with your client executive to establish network connectivity between Watson Care Manager and your application, and configure subscribers and subscriptions.

For network connectivity and allowlist purposes, you must provide the domain name or IP address of your application to your client executive.

In addition, you must register your application endpoint details and port number, by [Configuring subscribers and managing subscriptions \(on page 279\)](#).

For outbound mutual TLS authentication purposes, Watson™ Care Manager provides you with a client certificate that includes its public key, any parent intermediate certificates, and the parent public root certificate that you must store in your external system environment.

## Obtaining tokens using App ID

The IBM App ID service authorizes your access to the Watson™ Care Manager APIs by using the OAuth (Open Authorization) 2 protocol. Before you can make Watson™ Care Manager REST API calls, you must obtain a token so that IBM App ID can authorize your access.

After you obtain a token, you must include it in all subsequent calls to access Watson™ Care Manager REST API services.



### Note:

You can reuse tokens.

For more information about the concepts and technologies used by the App ID service, see the [IBM Cloud App ID documentation](#).

1. Obtain your tenant ID, client secret, and OAuth server URL from your credentials.
2. Encode your client ID and secret.
  - a. Copy your client ID and secret that you obtained in step 1.
  - b. Use a base64 encoder to encode your authorization information.
  - c. Copy the output.
3. Make a request to the API to obtain a token. The data section of your request varies depending on the type of grant type that you're using.

Example request:

```
curl -X POST \
https://{{region}}.appid.cloud.ibm.com/oauth/v4/{{tenant_id}}/token \
-H 'Authorization: Basic base64encode({{client-id}}:{{client-secret}})' \
-H 'Content-Type: application/x-www-form-urlencoded' \
-H 'Host: {{region}}.appid.cloud.ibm.com' \
-d grant_type=client_credentials
```

Example response:

```
{  
  "access_token": "eyJhbGciOiJSUzI1NiIsInR",  
  "expires_in": 43200,  
  "token_type": "Bearer"  
}
```

A successful response contains an `access_token` that you must include in all subsequent requests to access the Watson™ Care Manager APIs.

4. Include the following header in all subsequent requests.

```
Authorization: Bearer {{access_token}}
```

For more information about obtaining tokens, see [Obtaining tokens](#) in the IBM Cloud App ID documentation.

## Authentication

REST APIs are subject to the security controls that are implemented in the application. Most of the IBM Watson® Care Manager REST API services require you to authenticate before you can access the APIs. Requesting a REST API resource before authentication, or without valid credentials, always results in an HTTP response status code of 401 - Unauthorized. If you encounter this error, reauthenticate by following the procedure to obtain a token.

## Token Reuse

Tokens have a set lifespan and you can continuously reuse them until they expire. Generate a new token only when the previous token is no longer valid. IBM App ID provides an endpoint for you to check if a token is still valid. Before you make a request to the Watson™ Care Manager REST API, we advise you to check that your token is still valid.

Example token validation request:

```
curl 'https://{{region}}.appid.cloud.ibm.com/oauth/v4/{{tenant_id}}/introspect' \
-H 'Authorization: Basic base64encode({{client-id}}:{{client-secret}})' \
-H 'Content-Type: application/x-www-form-urlencoded' \
-d 'token=<your_access_token>'
```

Example token validation response:

```
{  
    "active": true  
}
```

For more information about validating tokens, see [Validating tokens](#) in the IBM Cloud App ID documentation.

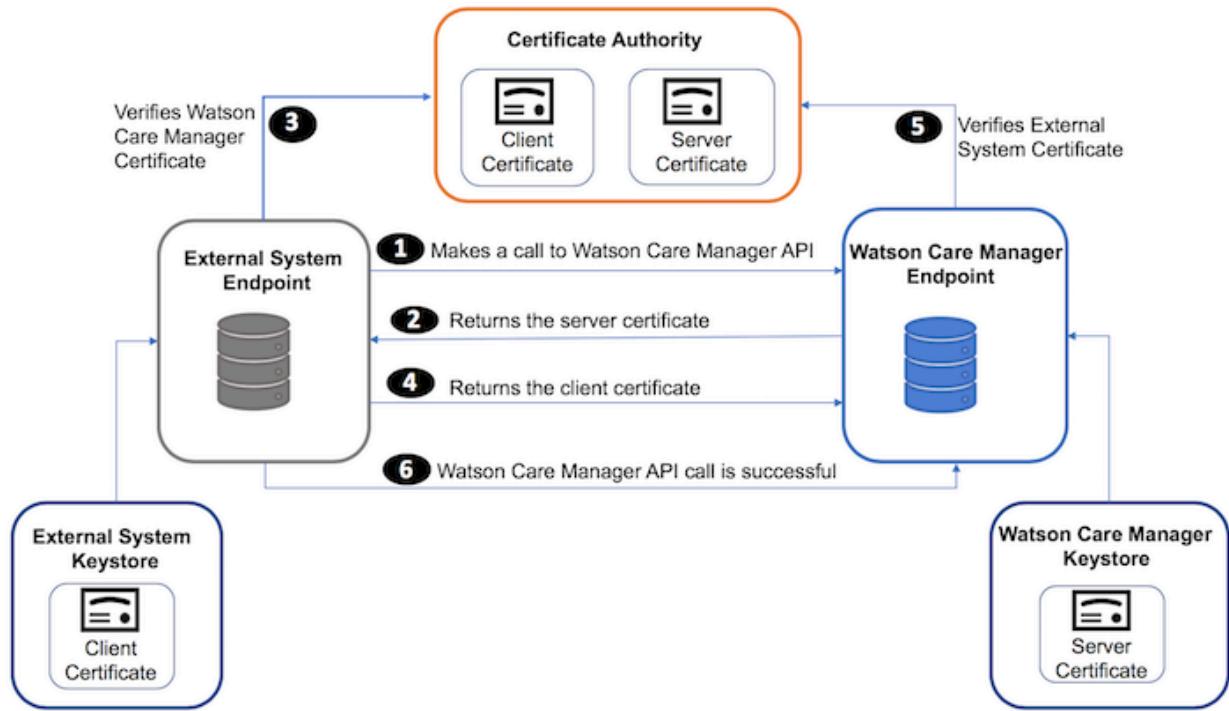
## Mutual TLS authentication

Watson™ Care Manager requires that all external API connections occur over a mutually encrypted connection, with certificate exchange between the endpoints.

The standard TLS protocol ensures that a client trusts the server that it is communicating with by verifying the server's certificate. In addition, mutual TLS ensures that the server only accepts connections from trusted clients through certificate verification. With mutual TLS, both parties authenticate each other by verifying a digital certificate that issued by a trusted Certificate Authority. The presence of the certificate assures each party of the others' identity.

A client (web browser or client application) authenticates itself to a server (website or server application). Then, the server authenticates itself to the client by verifying the provided certificate.

Figure 1. How mutual TLS authentication works between Watson™ Care Manager and external systems



1. The external system makes an API call to a Watson™ Care Manager API endpoint.
2. Watson™ Care Manager presents its certificate to the external system.
3. The external system verifies Watson™ Care Manager's certificate.
4. If successful, the external system sends its certificate to Watson™ Care Manager.
5. Watson™ Care Manager verifies the external system's certificate.
6. If successful, Watson™ Care Manager allows the API call to proceed.

## Versions

Whenever Watson™ Care Manager changes the API in a backwards-incompatible way, IBM releases a new version of the API. Therefore, API requests require the API version number in the URL. The version number of the REST API resources that you are using is included in the URL.

For example, <https://<host>:<port>/Rest/v1/individuals> where v1 is the version number and usually the first path parameter after the context path, <https://<host>:<port>/Rest>.

## Request and response handling

You can verify the integrity of HTTP requests and responses by ensuring your JSON is correct, that you are correctly connecting to a running instance of Watson™ Care Manager, and that you manage the volume of results via pagination.

### Requests

In IBM Watson® Care Manager, the HTTP requests only support JSON and require a valid JSON object for the body. The API catalog section includes complete examples for each request and `CURL` code examples so that you know how to format your requests and can anticipate what kind of data to expect in return.

### Response

All Watson™ Care Manager APIs connect to a specific instance of Watson™ Care Manager that is already running. The Watson™ Care Manager instance is identified by a combination of the Tenant ID and Instance Type attributes in the message header.

Each HTTP request will return a `tenantDetails` object, which lets you verify that the API you are connecting to is the correct instance and tenant.

### Pagination

Some API requests might return a large number of results. To avoid performance issues, these results are returned one page at a time, with a limited number of results on each page.

The default and maximum page size is 1000 objects. To use a different page size, use the `limit` query parameter.

For any request that uses pagination, the response includes a `pagination` object that specifies pagination information. This object includes two URLs that you can use to make subsequent requests:

- `previous`: the URL for requesting the previous page of results if any exists.
- `next`: the URL for requesting the next page of results. The `next` property is omitted if there no more results.

If no previous or next link exists, the entire results set is returned. These URLs retain the same `limit` parameter that were used for the initial request.

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### Related reference

[Watson Care Manager REST API catalog \(on page 448\)](#)

## Error codes

In response to each API call, Watson™ Care Manager returns a message with an appropriate HTTP status code. Each API contains a detailed list of error codes that can be returned.

The following HTTP response status codes confirm that the HTTP method completed successfully or that something went wrong with the client request.

- 200 - the message was processed successfully.
- 400 - an error occurred when processing the message. If the message fails, typically, it's because the message content failed a business validation rule, a required parameter was omitted, or the syntax was invalid in some way that caused the server to be unable to process the request sent by the client. The caller can resolve the issue by correcting the data and resubmitting.
- 401 - authentication was unsuccessful because the request to access a REST API resource was made before authentication or without valid credentials. The caller can resolve this issue by following the steps in [Obtaining tokens \(on page 412\)](#).
- 500 - a server-side error happened during processing. This is a rare occurrence.

In addition to the HTTP status code, failure responses include a body with fields that provide a more detailed breakdown of the error.

- Code - the HTTP status code (usually “400”)
- Message - the failure message consists of the code and a string description separated by a hyphen (-). Example: EESERR520 – A valid reference for a source system must be provided.
- Level - the failure level (usually “error”).

For each Watson™ Care Manager API, you can review the API Swagger documentation and see the detailed list of error codes that are returned. Go to the API library referenced in the related topic link, select an API to try out (Swagger output), and review the error codes in the Responses section of each HTTP method (GET, POST, PUT, DELETE). The following list is not intended to be an exhaustive list but a subset of the most common failure messages with explanations why API calls can fail.

### EESERR610 – Expected resourceType is Patient

Each message has a mandatory `resourceType` field that must match the endpoint that the message is sent to. In this case, the `v1/ees/individuals` resource expects that all messages sent to it will have a `resourceType` of `Patient`.

### EESERR504 – A subject reference must be provided

Watson™ Care Manager uses the subject/reference field to identify the individual that the message relates to. This field must be populated correctly.

#### **EESERR161 – There are no matching individuals based on the ID entered**

The identifiers provided in the subject/reference field of the message do not match any individual in Watson™ Care Manager.

#### **EESERR180 – The identification details provided match multiple clients**

The identifiers provided in the subject/reference field of the message match more than one client in Watson™ Care Manager. Therefore, the update cannot proceed because the client cannot be uniquely identified.

#### **EESERR351 – The resource id provided doesn't exist for a <type> record for this person**

POST messages will return a Watson™ Care Manager resource id that uniquely identifies the record that is created in Watson™ Care Manager. This resource can then be used as a path parameter for Updates (PUT) and Delete HTTP methods. This message will be returned if the resource id does not match a valid record in Watson™ Care Manager.

#### **EESERR624 – The record was updated by a Care Manager, so it can't be deleted by an external system**

Records that were created via API calls are visible in the UI to the Care Manager and can be edited. Once a Care Manager updates the record, however, it is assumed that they have the latest version and that no further updates or deletes are allowed from external systems.

#### **EESERR625 – The record was deleted by a Care Manager, so it can't be reactivated by an external system**

If the Care Manager deleted the record through the UI, no further updates or deletes will be allowed from external systems.

#### **EESERR630 – External system reference provided for name prefix matches no record**

When the Watson™ Care Manager administrator configures a name prefix, they must also enter an External System Reference code. This code can then be passed in the message body to identify the correct prefix. In this case, the External System Reference does not match the code in Watson Care Manager.

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#### **Related reference**

[Watson Care Manager REST API catalog \(on page 448\)](#)

## Client matching and identification

Attributes that are sent via an API are used to identify the correct client in Watson Care Manager. Client matching occurs in Watson™ Care Manager when the API passes either a client reference number or an Identifier Type and Identifier value as a key-value pair.

Each API includes a Subject field to link the message to an individual in Watson™ Care Manager. This field includes a Reference object that supports two formats: (i) WCM Reference Number (ii) Key-Value pair of Public Identifiers.

### Reference number

The reference number is the unique identifier that is automatically generated and assigned to each client when they are registered in Watson™ Care Manager. If the reference number is known, include it as follows:

```
"subject": {
    "reference": "Patient/28416"
},
```



#### Tip:

In the Watson™ Care Manager UI, you can see the client's Reference Number on their Data page.

Example:

Mitch Delaney  
71 Years  
05/10/1947  
Male  
Priority: Not Set

Actions  
Address  
Address Unavailable,  
Phone

Identification			
Description	Date	Updated On	
Reference Number 28416	23/11/2018 -	23/11/2018 06:59	[More]

## Public identifiers

All other identifiers are referred to as public identifiers. These are values that are added in Watson™ Care Manager by a care team member or are received via the Demographics API. Typically, these identifiers are

ones that are used on other systems such as a Court System ID, medical record number (MRN), and so on. To use a public identifier, include the system and value as follows:

```
subject": {  
    "reference": "Patient/identifier=passport, identifiervalue=P123"  
},
```

In some cases, two clients might have the same public identifier type and value. In this instance, the API call will return a [4XX response code \(on page 418\)](#) to confirm that the client cannot be uniquely identified. To prevent this happening, add a third attribute, the client's date of birth in 'YYYYMMDD' format as follows:

```
"subject": {  
    "reference": "Patient/identifier=passport, identifiervalue=P123,  
birthdate=19400312"  
},
```

---

#### Related information

[Exploring API use cases \(with real-world examples\) \(on page 425\)](#)

## Source and Original Source System identifiers

For users to have confidence in the validity and reliability of incoming data from external systems and outgoing data from Watson™ Care Manager, the APIs can pass Source and Original Source System values that confirm where data records come from.

When externally received via an API, the Source value represents the platform that is sharing data with Watson™ Care Manager for example, Phytel external system. The Original Source System is the name of the system where the data was entered for the very first time, for example, Quest Diagnostics.

```
"source": {  
    "coding": [  
        {  
            "system": "http://wcm/source",  
            "code": "PHYTEL"  
        }  
    ]  
},  
  
"originalsource": {  
    "coding": [  
        {  
            "system": "http://wcm/originalsource",  
            "code": "QUEST"  
        }  
    ]  
},
```

Equally, some outbound APIs from Watson™ Care Manager can pass Source and Original Source System values to help users of external applications understand whether data was created internally in Watson™ Care Manager or where it originated. For example, the outbound Notes and Touchpoints API includes Source and Original Source System values.

The Watson™ Care Manager administrator configures the source and original source systems in the application. For more information, see [Configuring data sources \(on page 195\)](#).

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#### Related information

[Exploring API use cases \(with real-world examples\) \(on page 425\)](#)

## External system reference identifiers

Watson™ Care Manager enables an Administrator to customize the product by adding configurations for many different data types. Attributes in the API calls can include references to one or more of those data types, for example, an Assessment Type, Note type or Alert type. A code must be included in the message body to link the data type to the correct configuration. The Watson™ Care Manager Administrators can enter their own code - an External System Reference - to match data types sent in the API calls to their configured data types.

## External System Reference identifier

The external system reference is the code that represents the type of information that is sent externally via an outbound API, or is received via an inbound API from an external application. Data matching of information types occurs when the API passes an external system reference in the body of the message when making the API call, and the reference code matches the configured value for the information type in Watson™ Care Manager.

```
coding: [
  {
    system: 'http://wcm/assessment',
    code: 'AS1234'
```

In this instance, let's suppose a score-only assessment type is configured by the Watson™ Care Manager administrator to have this External System Reference: AS1234. When the score-only assessment result is received for Laurie Thompson via the API, the application stores the data as a result of an assessment of type AS1234.



### Tip:

In the Watson™ Care Manager UI, you can see how an administrator can associate an External System Reference with each new assessment type that they configure. Example:

The screenshot shows a modal dialog titled "New Assessment". The dialog has a light blue header bar with an "i" icon on the left and a help/cancel icon on the right. Below the title, there is a note "\* required field". The form contains five input fields: "Name" (Exercise), "External System Reference" (AS1234), "Version Type" (Score Only), "Display History in Program (Days)" (0), and a large "Description" text area which is currently empty. At the bottom right of the dialog are "Save" and "Cancel" buttons.

### Related information

[Exploring API use cases \(with real-world examples\) \(on page 425\)](#)

## Record identifiers

Watson™ Care Manager APIs allows an API caller to include a record identifier with each record that is sent from an external system via an inbound API. The external API caller uses this identifier to uniquely identify the record on their external system. This enables the API caller to interact with records in Watson™ Care Manager without needing to store the internal Watson™ Care Manager record id.

### External record identifier

The external record identifier is passed in the message body as a key value pair.

```
"identifier": [{"  
    "value": "CS100225098",  
    "type": {  
        "text": "COURTID"  
    }  
}],
```

In this example, the ID of the record on the Court System is `CS100225098`, which can be stored with the record in Watson™ Care Manager as its external identifier. The API caller can pass the external record identifier to Watson™ Care Manager for Create and Update API calls. However, the record identifier cannot be used to delete a record. In this instance, the internal Watson™ Care Manager identifier must be used.

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#### Related information

[Exploring API use cases \(with real-world examples\) \(on page 425\)](#)

## Exploring API use cases (with real-world examples)

What can your organization do with each API in the REST API catalog? The following real-world scenarios demonstrate how each API can be used to deliver care for clients and create value in an organization. The use cases show potential implementations of the API rather than being an exhaustive list that exactly matches your reason for interest in the API.

To illustrate work flow from an external system to Watson™ Care Manager, a subset of **inbound API use cases** follows for Alerts, Client Registrations and Demographics (Address).

To illustrate work flow from Watson™ Care Manager to an external system, an **outbound API use case** follows for Share Care Plan (including webhooks).

### Alerts API usage (inbound)

When specific information that could influence a client's care management is recorded in an external system, you can use the Alerts API (inbound API) to create an alert in Watson Care Manager. For example, an external system might use the Alerts API to send an alert to Watson Care Manager when a client is admitted to or discharged from hospital.

The following business scenario is for illustrative purposes only. You can apply many additional use cases to suit your specific needs, for example, in a healthcare space or specialty court environment.

## Business problem

Let's suppose that a specialty court team is using an external system to assess individuals who have been referred to the justice system for law violations. Carla Jean is an individual living in the specialty court district who has been referred to the justice system for pre-trial assessment - but she fails to appear in court.

Susan Brown, as the Care Manager who is managing Carla in Watson™ Care Manager, needs to be made aware that she did not appear in court.

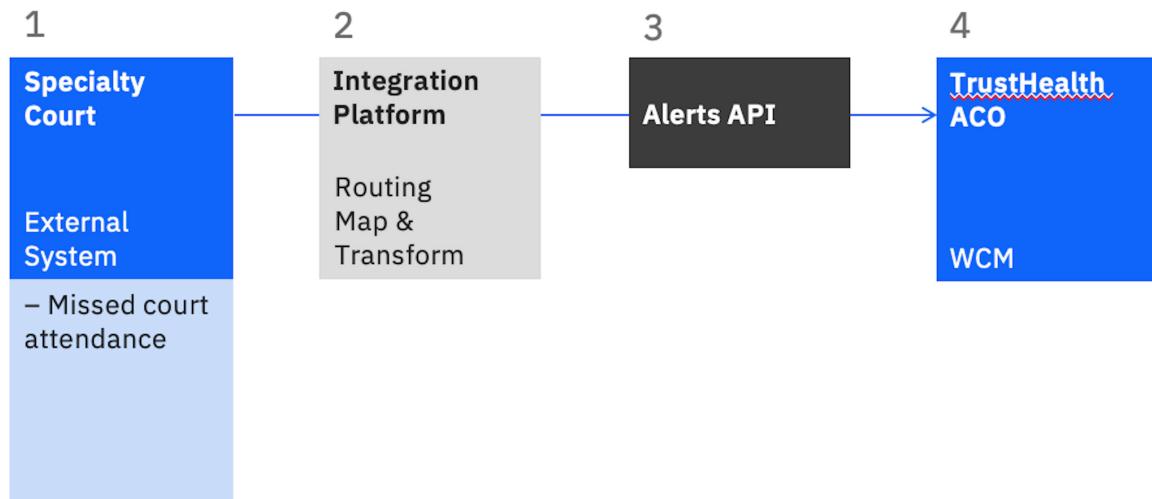
## Why integrate Watson™ Care Manager with an external system?

The court's external risk assessment system interfaces with Watson™ Care Manager so that a multidisciplinary team can manage Carla Jean's care (and you can presume that the necessary administrator configuration is already complete in Watson™ Care Manager to facilitate the integration).

In this scenario, when Carla Jean's failure to appear in court is entered in the court's external system, that action triggers the sending of an Alert to Watson™ Care Manager via the Alerts API. In Watson™ Care Manager, Care Manager Susan is alerted about Carla Jean's non-appearance in court without having to log into the external court system to retrieve this information. The time savings benefit Susan in her role and the clients she cares for.

The following diagram shows the end-to-end workflow:

Figure 2. Alerts API Example: Court System Alert



1. A team member in the specialty court team records that Carla Jean missed her court attendance, and clicks the action to send the alert record to Watson™ Care Manager.
2. The Integration Platform layer receives the data and builds a message to send to Watson Care Manager.
3. The message is sent to the Alerts API.
4. The alert about Carla Jean's non-attendance in court is received in Watson™ Care Manager and displayed on the client's Summary page.

### How is the client, Carla Jean, identified in Watson Care Manager?

For more information about the API attributes that enable the correct client to be identified, see [Client matching and identification \(on page 420\)](#).

### Inputs to the Alerts API: mandatory and optional attributes

To send an alert from an external system to Watson™ Care Manager, the Alerts API must receive certain attributes and associated values. Other API attribute values are optional. The following table highlights the mandatory attributes (\*) and the optional attributes that are passed in the Alerts API call.

API attributes	Description
<pre>{   "resourceType": "Flag",</pre>	<b>Resource type *</b> - Flag is the FHIR resource for Alert.
<pre>"source": {   "coding": [     {       "system": "http://wcm/source",       "code": "COURTS"     }   ] },</pre>	<b>Source *</b> - COURTS indicates that the court system is the source of the alert. This code is configured as an External System Reference on the Sources page for the Alerts data type (Administrator Workspace). See <a href="#">Source and Original Source System identifiers (on page 421)</a> .
<pre>"originalsource": {   "coding": [     {       "system": "http://wcm/originalsource",       "code": "PROBMGR"     } ]</pre>	<b>Original Source System</b> - PROBMGR indicates that the Probation Manager reported Carla Jean's absence. This code is configured as an External System Reference on the Original Source Systems page for the Alerts data type (Administrator Workspace). See <a href="#">Source and Original Source System identifiers (on page 421)</a> .

API attributes	Description
},	
<pre data-bbox="225 369 514 665"> "identifier": [     {         "value": "CS100225098",         "type": {             "text": "COURTID"         }     } ], </pre>	<b>Identifier</b> - CS100225098 is the reference that uniquely identifies this record in the Court System. Watson™ Care Manager stores this ID and uses it when an Alert update occurs as described in <a href="#">Record identifiers (on page 424)</a> .
<pre data-bbox="236 770 432 792"> "status": "active", </pre>	<b>Status</b> - FHIR lists two possible Statuses - Active, Inactive. These statuses are mapped to Open or Closed in Watson™ Care Manager.
<pre data-bbox="236 960 669 1214"> "category": [     {         "coding": [             {                 "system": "http://wcm/alerttype",                 "code": "NONAPPEARANCE"             }         ]     }, </pre>	<b>Category *</b> - Specifies the type of Alert to be displayed in Watson Care Manager. See <a href="#">External system reference identifiers (on page 422)</a> .
<pre data-bbox="236 1362 742 1531"> "code": {     "text": "Failed to appear in Court - warrant issued" }, </pre>	<b>Code</b> - Description that is displayed on the Alert.
<pre data-bbox="225 1742 579 1869"> "subject": {     "reference": "Patient/30283" }, </pre>	<b>Subject *</b> - 30283 is Carla Jean's WCM Reference number that is used to associate the Alert with her as described in <a href="#">Client matching and identification (on page 420)</a> .

API attributes	Description
<pre>"priority": "low",</pre>	<b>Priority *</b> - The priority that the alert is assigned in Watson Care Manager - low, medium, high, critical.
<pre>"notifyrole": [   "coding": [     "system": "http://wcm/careteamroles",     "code": "CT001"   ] }</pre>	<b>NotifyRole</b> - A reference to one of the care team roles that the Administrator configured. Any team member with this role will receive this alert.



### Tip:

In the REST API catalog that is referenced below, go to the Alerts API (Swagger output). Try out the API calls and see the detail of this topic in action!

## Error Handling

For more information about the HTTP status codes that indicate success or failure in API calls, see [Error codes \(on page 418\)](#).

### Related reference

[Watson Care Manager REST API catalog \(on page 448\)](#)

## Client Registration API usage (inbound)

Clients do not need to be manually registered in Watson™ Care Manager. Using the Client Registration API (inbound API), you can automatically register clients in Watson™ Care Manager from an existing record in an external system and ensure that their demographic data is accurately reflected in Watson™ Care Manager. The demographic details that can be sent in the registration record include the client's name, date of birth, gender, marital status, address, phone number, identification. A maximum of 5 names, 5 addresses, 10 identifications, and 5 phone numbers can be sent for one client.

The following business scenario is for illustrative purposes only. You can apply many additional use cases to suit your specific needs, for example, in a healthcare space or specialty court environment.

### **Business problem**

Let's suppose that an addiction and rehab clinic, One Step Medical Center, is engaging with Joe Lopez who has a history of alcoholism. Due to a recent leg injury that occurred at home, Joe cannot work and was evicted from his apartment for not paying rent. He is currently in temporary shelter. One Step Medical Center is helping Joe to get his substance use under control but he needs wider care management expertise to address his housing need and his leg injury.

Joe's Primary Care Physician (PCP) wants him to start working with a multidisciplinary team and Joe has agreed to this. The PCP has documented his agreement to be referred to TrustHealth ACO in Joe's Electronic Medical Record (EMR).

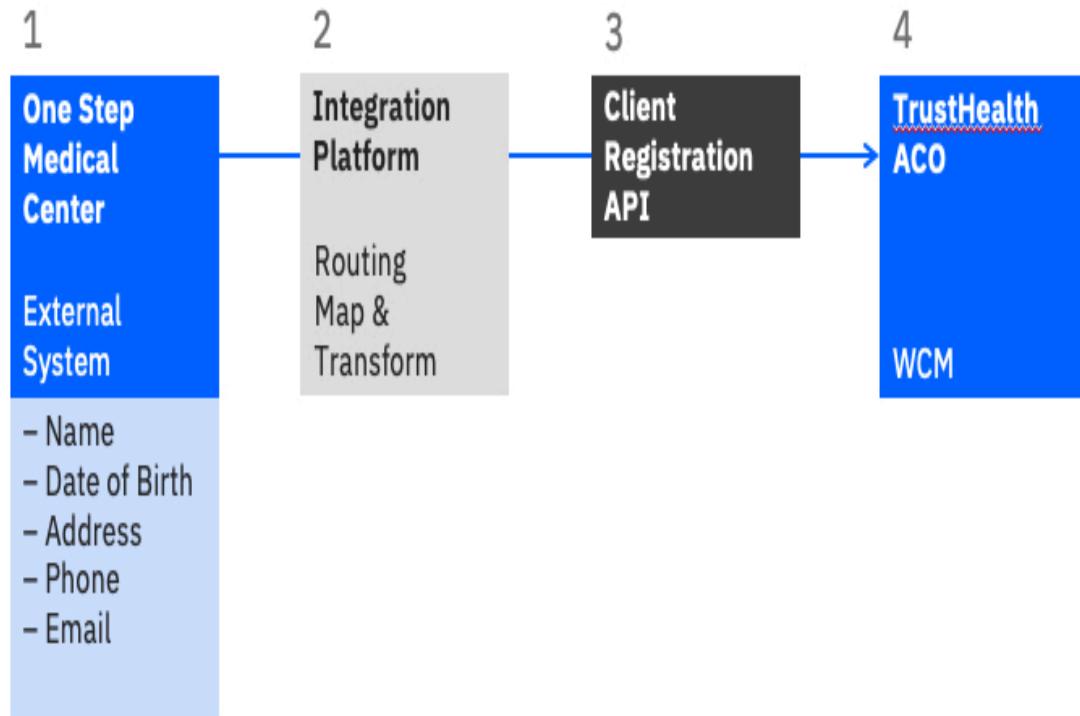
### **Why integrate Watson™ Care Manager with an external system?**

The One Step Medical Center interfaces with Watson™ Care Manager so that a multidisciplinary team can manage Joe's care needs (and you can presume that the necessary administrator configuration is already complete in Watson™ Care Manager to facilitate the integration). Using the API to register Joe is a time-efficient method that saves someone in TrustHealth ACO having to manually register his details in Watson™ Care Manager.

A member of the One Step team initiates the action to refer Joe Lopez to TrustHealth ACO and via the Client Registration API, Joe's demographic, contact, and ID data is recorded in Watson™ Care Manager in his registration record.

The following diagram shows the end-to-end work flow and you can see that in the API call, the `Patient` resource contains all of the demographic data relating to the client.

Figure 3. Client Registration API Example: Joe Lopez



1. A team member in the One Step Medical Center clicks the action to send Joe's registration record to Watson™ Care Manager.
2. The Integration Platform layer receives the data and builds a message to send to Watson Care Manager.
3. The message is sent to the Client Registration API.
4. The registration details for Joe is received in Watson™ Care Manager and displayed on the client's Summary page when accepted in the application.



**Note:**

Depending on the details that are registered for the client in the external system, you can expect the following data to be populated at a minimum in Watson™ Care Manager:

- Name
- Birth and Death details
- Gender



## ◦ Status

Optionally, these attributes can be populated: Address, Phone number, Email, IDs, Marital Status

## Inputs to the Client Registration API: mandatory and optional attributes

To send a client registration record from an external system to Watson™ Care Manager, the Client Registration API must receive certain attributes and associated values. Other API attribute values are optional. The following table highlights the mandatory attributes (\*) and the optional attributes that are passed in the Client Registration API call.

API attributes	Description
<pre>{   "resourceType" : "Patient",</pre>	<b>Resource type *</b> - Patient is the FHIR resource for a client.
<pre>"source" : {   "text" : "One Step Medical",   "coding" : [ {     "system" : "http://wcm/source",     "code" : "ONESTEP"   } ] },</pre>	<b>Source *</b> - This is the top-level Source object, which is applied to all records that are created as part of this transaction (Names, Addresses, and so on) unless those records separately include their own Source object. See <a href="#">Source and Original Source System identifiers (on page 421)</a> .
<pre>"active" : true,</pre>	<b>Active *</b> - Indicates whether the client should be Active in Watson Care Manager. Note that for inbound registration calls, the client must be Active and not Deceased.
<pre>"gender" : "male",</pre>	<b>Gender *</b> - The gender status, for example, Male, Female, Other, Unknown.
<pre>"birthDate" : "1977-09-26",</pre>	<b>BirthDate *</b> - required format: YYYY-MM-DD

API attributes	Description
<pre>"deceasedBoolean" : false,</pre>	<b>DeceasedBoolean</b> - true or false flag
<pre>"deceasedDate" : "",</pre>	<b>DeceasedDate</b> - required format: YYYY-MM-DD. Note that for inbound registration calls, the client must be Active and not Deceased.
<pre>"maritalStatus" : {   "coding" : [ {     "system" : "http://hl7.org/fhir/v3/MaritalStatus",     "code" : "UNK"   } ], }</pre>	<b>MartialStatus</b> - the code that is defined in the FHIR marital status codeset. In this example, the client's status is Unknown.
<pre>"period" : {   "start" : "2018-10-09",   "end" : "" }, },</pre>	<b>Period</b> - a date range that is associated with the client's current marital status. Required format: YYYY-MM-DD
<pre>"name" : [ {   "use" : "official",   "family" : "Lopez",   "given" : "Joe",   "prefix" : "",   "suffix" : "",   "middle" : "",   "period" : {     "start" : "2018-10-09",     "end" : ""   } }, {   "use" : "old",   "family" : "Lopez", }</pre>	<b>Name*</b> - In this example, Joe has 2 name records. A maximum of 5 names can be provided but one of these must be for official use.  Name fields are defined per the FHIR HumanName datatype.

API attributes	Description
<pre> "given" : "Joseph", "prefix" : "", "suffix" : "", "middle" : "M", "period" : {   "start" : "2018-10-09",   "end" : "" } ], </pre>	
<pre> "address" : [ {   "use" : "temp",   "city" : "Santa Rosa",   "line1" : "2437 Forse LN",   "line2" : "",   "line3" : "",   "state" : "CA",   "postalCode" : "95404-7806",   "country" : "",   "period" : {     "start" : "2018-10-09",     "end" : ""   } }, {   "use" : "home",   "city" : "Santa Rosa",   "line1" : "600 Morgan Street",   "line2" : "",   "line3" : "",   "state" : "CA",   "postalCode" : "95401",   "country" : "",   "period" : {     "start" : "2011-10-09",     "end" : "2018-10-09"   } } ] </pre>	<p><b>Address</b> - List of addresses for the client. A maximum of 5 records can be provided.</p> <p>Address fields are defined per the FHIR Address data type.</p>

API attributes	Description
<pre>         }     } ], </pre>	
<pre> "telecom" : [ {     "system" : "phone",     "value" : "(707) 494-2472",     "use" : "home",     "period" : {         "start" : "2018-01-01",         "end" : "2018-01-02"     } }, {     "system" : "phone",     "value" : "(707) 494-2472",     "use" : "temp",     "period" : {         "start" : "2018-01-01",         "end" : "2018-01-02"     } }, {     "system" : "email",     "value" : "lopez.joe@anymail.com",     "use" : "home",     "period" : {         "start" : "2018-01-01",         "end" : "2018-01-02"     } } ] , </pre>	<p><b>Telecom</b> - the contact details for the client, which can consist of phone numbers or email addresses as defined per the FHIR ContactPoint datatype.</p>
<pre> "identifier" : [ {     "value" : "220398B4",     "type" : { </pre>	<p><b>Identifier</b> - Public identifiers for Joe can be recorded. In this example, the IDs from <u>One Step</u> and <u>EPIC</u> are included, which can be used to identify Joe as</p>

API attributes	Description
<pre> "coding" : [ {   "system" : "http://wcm/identification",   "code" : "ONESTEPID" }, {   "period" : {     "start" : "2018-10-09",     "end" : ""   } }, {   "value" : "SJMJ1092677",   "type" : {     "coding" : [ {       "system" : "http://wcm/identification",       "code" : "EPICID"     } ],   "period" : {     "start" : "2018-10-09",     "end" : ""   } } ] } </pre>	<p>described in <a href="#">Client matching and identification (on page 420)</a>.</p>


**Tip:**

In the REST API catalog that is referenced below, go to the Client Registration API (Swagger output). Try out the API calls and see the detail of this topic in action!

## Error Handling

For more information about the HTTP status codes that indicate success or failure in API calls, see [Error codes \(on page 418\)](#).

---

## Related reference

[Watson Care Manager REST API catalog \(on page 448\)](#)

## Address API usage (inbound)

A Watson™ Care Manager record and an Electronic Medical Record (EMR) on an external system must reflect the same details about a client. When a change occurs in a client's address in the external system, this API synchronizes the client's data in Watson™ Care Manager with the latest update that is recorded for the client in the external system.

The following business scenario is for illustrative purposes only. You can apply many additional use cases to suit your specific needs, for example, in a healthcare space or specialty court environment.

### Business problem

Let's suppose that Joe Lopez is already registered in Watson™ Care Manager (via the Client Registration API) for reasons that are described [here \(on page 429\)](#). At the time of his registration, no address was recorded for Joe because he had no fixed abode after having been evicted from his apartment.

During a recent visit with his Primary Care Physician (PCP) in One Step Medical Center, Joe mentioned that he moved in with his parents to help him get back on track. This news prompted his PCP to enter Joe's new address in his EMR on the external system, which triggers an address update to be sent to Watson™ Care Manager via the Address API.

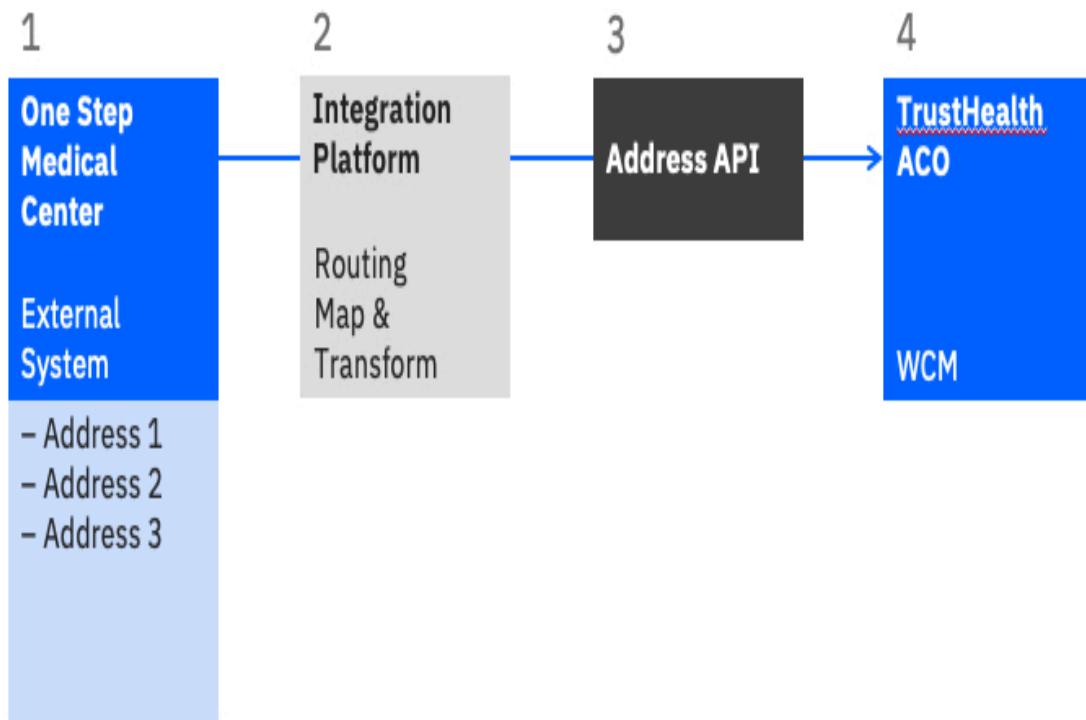
### Why integrate Watson™ Care Manager with an external system?

The external system interfaces with Watson™ Care Manager so that a multidisciplinary team in TrustHealth ACO can access Joe's latest demographic details and contact him when needed (and you can presume that the necessary administrator configuration is already complete in Watson™ Care Manager to facilitate the integration). Being able to update a client's demographic details using an API means that someone in TrustHealth ACO does not have to manually record the data that already exists on the external system. The process is automated so that the client's address details in Watson Care Manager and the record update in the external system are in sync, which for the care team, saves them considerable time and assures them of accurate and reliable data.

In this scenario, Joe's PCP initiated an action to update Joe's address record on their system and his address details in Watson™ Care Manager synchronized with the update via this API.

The following diagram shows the end-to-end work flow and you can see that in the API call, the `Address` resource contains all of the demographic data relating to the client.

Figure 4. Address API (inbound) Example: Joe Lopez address update



1. A team member in the One Step Medical Center clicks the action to update Joe's address and send the address record to Watson™ Care Manager.
2. The Integration Platform layer receives the data and builds a message to send to Watson Care Manager.
3. The message is sent to the Address API.
4. The address details for Joe are received in Watson™ Care Manager and displayed on the client's Summary page when accepted in the application.

### How is the client, Joe Lopez, identified in Watson™ Care Manager?

For more information about the API attributes that enable the correct client to be identified, see [Client matching and identification \(on page 420\)](#).

### Inputs to the Address API: mandatory and optional attributes

To send an address record from an external system to Watson™ Care Manager, the Address API must receive certain attributes and associated values. Other API attribute values are optional. The following

table highlights the mandatory attributes (\*) and the optional attributes that are passed in the Address POST call to create the new address record for Joe Lopez.

API attributes	Description
<pre>{   "resourceType": "Address", }</pre>	<b>Resource type *</b> - Address. Note there is no Address resource type in FHIR - this represents a sub-resource.
<pre>"identifier": [   {     "value": "103399884",     "type": {       "text": "TRUSTCOID"     }   } ],</pre>	<b>Identifier</b> - An External record identifier for this record can be shared as described in <a href="#">Record identifiers (on page 424)</a> . In this example, the ID of this record on the Trust Co system is 103399884 .
<pre>"source": {   "coding": [     {       "system": "http://wcm/source",       "code": "TRUSTCO"     }   ],   "text": "TrustCo" },</pre>	<b>Source</b> - The source for this Address is TRUSTCO. See <a href="#">Source and Original Source System identifiers (on page 421)</a> .
<pre>"originalSource": {   "coding": [     {       "system": "http://wcm/originalsource",       "code": "ALLSCRIPT"     }   ],   "text": "AllScripts EMR" },</pre>	<b>Original Source System</b> - The Address record was originally recorded in the AllScripts system before being aggregated by TrustCo. See <a href="#">Source and Original Source System identifiers (on page 421)</a> .
<pre>"use": "work", "state": "NJ",</pre>	<b>Address</b> - A single address record for Joe Lopez. The Address fields are defined as per the FHIR datatype.

API attributes	Description
<pre> "country": "US", "city": "Trenton", "line1": "Apt 1234", "line2": "Greenfields Rise", "line3": "Esker Road", "postalCode": "NJ8899", "period": {     "start": "",     "end": "" }, </pre>	
<pre> "subject": {     "reference": "Patient/identifier=ONESTEPID,     identifiervalue=220398B4" } } </pre>	<p><b>Subject *</b> - Joe Lopez can be identified as the subject for this Address by using the Identifier that is recorded for him during registration. For more information, see <a href="#">Client matching and identification (on page 420)</a>.</p>



### Tip:

In the REST API catalog that is referenced below, go to the Address API (Swagger output). Try out the API calls and see the detail of this topic in action!

## Error Handling

For more information about the HTTP status codes that indicate success or failure in API calls, see [Error codes \(on page 418\)](#).

### Related reference

[Watson Care Manager REST API catalog \(on page 448\)](#)

## Care Plan API usage (outbound)

Care managers need to share their client's care plan details with other team members who may not be users of Watson™ Care Manager. With this API, when a care team member takes the action to send a care plan from Watson™ Care Manager, a PDF version is transmitted to the specified external recipient in a series of automated push notifications and callbacks between Watson™ Care Manager and the external system (Webhooks implementation).

The following business scenario is for illustrative purposes only. You can apply many additional use cases to suit your specific needs, for example, in a healthcare space or specialty court environment.

### **Business problem**

Let's suppose that Joe Lopez is already registered in Watson™ Care Manager (via the Client Registration API) for reasons that are described [here \(on page 429\)](#). Joe was referred to Trusthealth ACO by his Primary Care Physician (PCP), who is based in One Step Medical Center. Joe attends his first care management session in Trusthealth ACO and meets his care manager Susan Brown.

To better understand his care needs, Susan completes the initial intake assessment with Joe and together, they prioritize the need for him to find a new home and to recover from his leg injury so that he can get back to work. They agree on a set of goals for Joe to work towards over the next 7 days before their next touchpoint occurs. Susan is keen to let Joe's referring PCP know about his care plan but the PCP is not a user of Watson™ Care Manager.

After Susan finishes her updates to Joe's care plan in Watson™ Care Manager, the Care Plan is sent to subscribed external systems in electronic PDF format. The EMR used in One Step Medical Center is one of the subscribing external systems, which means that Joe's PCP is able to view the WCM Care Plan in the system that he typically uses for client care management.<sup>1</sup>

### **Why integrate Watson™ Care Manager with an external system?**

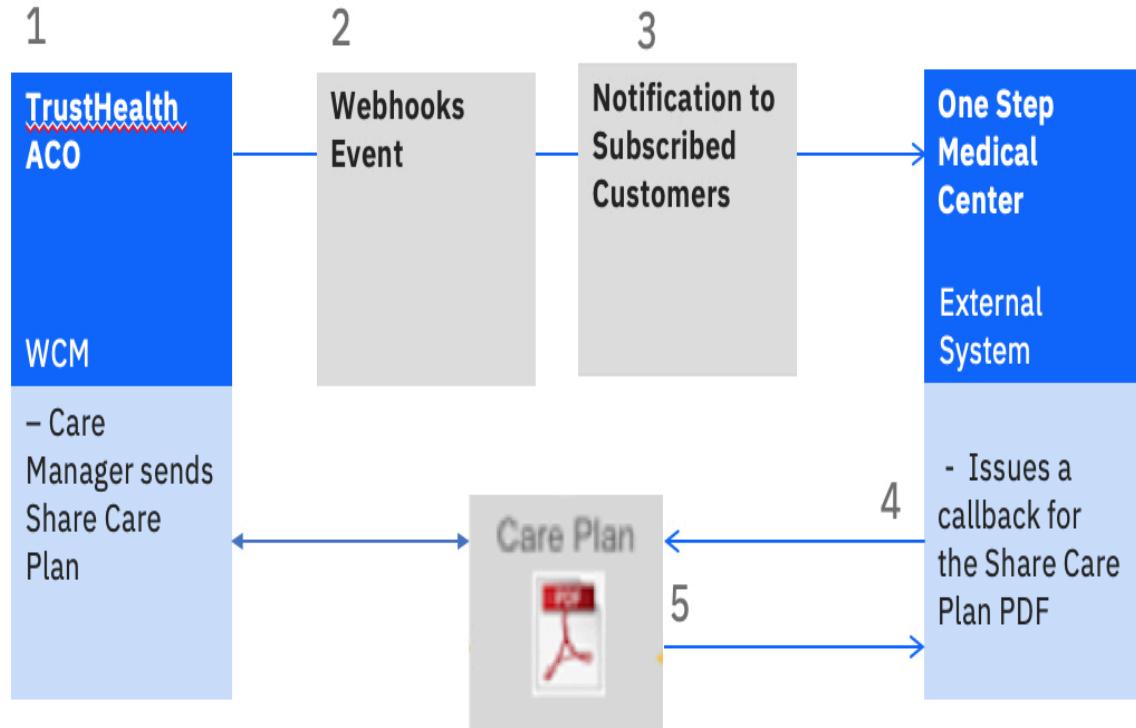
Watson™ Care Manager interfaces with the external system so that a multidisciplinary team can manage Joe's care needs (and you can presume that the necessary administrator configuration is already complete in Watson™ Care Manager to facilitate the integration). Using the Care Plan API to send Joe's Care Plan PDF electronically is a time-efficient method that saves someone having to manually share the document or to rely on printed hard copy versions. Susan would otherwise have to download and share the PDF each time that she needed to inform Joe's PCP about his care plan and progress. With this API, Susan simply selects the Send option in WCM and the API does the rest in an automated process.

When the team in One Step Medical Center receive the Care Plan PDF from Watson™ Care Manager, they have the complete picture of Joe's care plan progress and can assess his outstanding needs. Sharing of

the care plan PDF between Watson™ Care Manager and an external system facilitates the team's optimum collaboration in a person's holistic care.

The following diagram shows the end-to-end workflow:

Figure 5. Care Plan API Example: Joe Lopez



1. Susan Brown, the Care Manager in TrustHealth ACO, clicks the action to send the Joe Lopez care plan PDF to his PCP in One Step Medical Center. Note that the Watson™ Care Manager administrator can configure **Share With** values to specify intended recipients for the Care Plan.
2. Clicking **Send** in Watson™ Care Manager causes the Webhooks framework to trigger an event for Share Care Plan data (to which One Step Medical Center is subscribed and registered to receive notifications). For more information about the Webhooks framework in the context of Watson™ Care Manager integrations, see [Using webhooks notifications to retrieve data \(on page 445\)](#).
3. The subscribed customer, One Step Medical Center, is notified of this event via a notification message. The subscribed customer must use the URL in the notification message to call back Watson Care Manager for the updated Care Plan PDF. Because the Care Plan PDF is a snapshot in time of a client's care plan, if an external system user wants to access the most recent care plan for a client, the URL in the most recent webhook event must be used. The URL link that gives the customer access to the care plan PDF does not expire.

4. When the external system user, Joe's PCP, issues the call back, the PDF is generated in Watson™ Care Manager and sent to the external system user.



**Remember:**

The Care Plan PDF is not generated when the care manager triggers the share care plan event. When the callback occurs from the external system user, the Care Plan is sent from Watson™ Care Manager to the specified recipient in the external system.

### Inputs to the Care Plan API: mandatory and optional attributes

To receive a client's care plan from Watson™ Care Manager, the external system user must make two separate API calls to get all of the information related to the client's Share Care Plan PDF.

The first callback is initiated via the URL provided in the notification message and returns certain attributes and associated values to the external system user. Other API attribute values are optional. The following table highlights the mandatory attributes that are returned in response to the first call back from the external system.

Attribute Name	Mandatory or Optional	Comment
Record ID	Mandatory	Mandatory
Original Source System	Mandatory	Defaults to Watson™ Care Manager. For more information about the Source and Original Source System attributes, see <a href="#">External system reference identifiers (on page 422)</a> .
Source	Mandatory	
Originator	Mandatory	The name of the Watson™ Care Manager user who generated the Share Care Plan event from Watson™ Care Manager.
Requested DateTime	Mandatory	The date and time that the Watson™ Care Manager user generated the Share Care Plan event from Watson™ Care Manager.

Attribute Name	Mandatory or Optional	Comment
Template Name	Mandatory	The name of the Share Care Plan report template that is selected to be shared with the external system user.
External System Reference for 'Report Template'	Optional	For more information about the External System Reference attribute, see <a href="#">External system reference identifiers (on page 422)</a> .
Share With	Optional	The name of the intended recipient of the Share Care Plan report template in the external system.
External System Reference for 'Share With'	Optional	For more information about the External System Reference attribute, see <a href="#">External system reference identifiers (on page 422)</a> .
Note	Optional	
URL	Mandatory	The URL that must be used when making the second callback to access the Care Plan PDF.

The second callback is initiated via the URL provided from the first callback, and returns the PDF to the external system user. The PDF is generated in Watson™ Care Manager when the second callback from the external system occurs.



#### Tip:

In the REST API catalog that is referenced below, go to the Care Plan API (Swagger output). Try out the API calls and see the detail of this topic in action!

## Error Handling

For more information about the HTTP status codes that indicate success or failure in API calls, see [Error codes \(on page 418\)](#).

---

**Related reference**

[Watson Care Manager REST API catalog \(on page 448\)](#)

## Using webhooks notifications to retrieve data

Webhooks extends the REST API infrastructure to enable you to further integrate your applications with Watson™ Care Manager. Watson™ Care Manager uses webhooks to send notifications in real-time when data updates occur in Watson™ Care Manager so that you can retrieve the latest version of the data.

Before you can receive notifications, certain information is required by Watson™ Care Manager to allow outbound flow of data from Watson™ Care Manager to your external application. For more information, see [Required information for API flows \(on page 412\)](#).

Watson™ Care Manager shares only the following data via notifications and REST APIs:

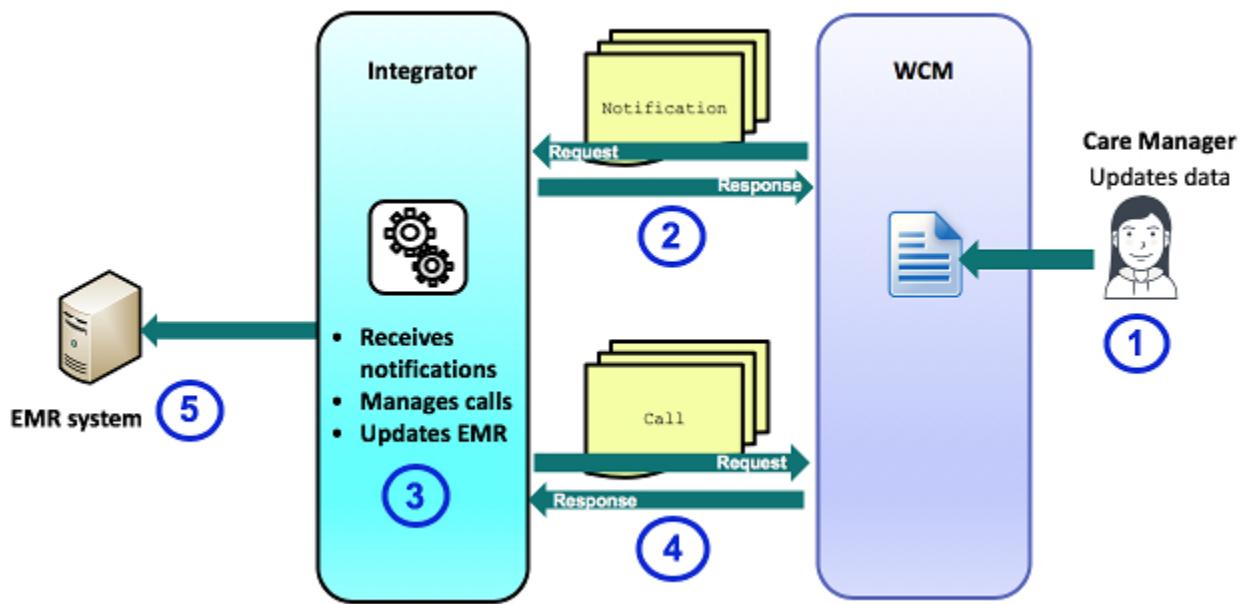
- Assessments
- Client care plans
- Client deletions

**Note:**

Under data privacy regulations, you are automatically subscribed to client status data notifications, which notify you about client deletions in Watson™ Care Manager. For more information, see [Subscribing to notifications \(on page 286\)](#).

- Configurable client data types
- External inquiries
- External messaging
- External referrals
- Programs
- Questionnaires

### How Watson™ Care Manager uses webhooks to interact with your application



When a Care Manager enters or updates data in Watson™ Care Manager, you receive a HTTP POST notification from Watson™ Care Manager. After you receive the notification, you must make a HTTP GET request to retrieve the information and update the record in the EMR.

## Reviewing the notification message

When a relevant event occurs for a data type that you are subscribed to, Watson™ Care Manager sends an HTTP POST notification message to the endpoint that you configured for the subscriber. Use the message to determine whether to make an HTTP GET call to retrieve the data.

### Example notification message

The following shows an example notification message that is sent by Watson™ Care Manager. The notification is specific to a create event for a configurable client data type.

```
{
  "dateTime" : "2019-05-30 14:43:33",
  "source" : "S10000",
  "originalSource" : "0S10000",
  "url" : "/Rest/v1/ees/customdata/ln/520215",
  "type" : " WHDT130003",
  "externalSystemReference": "ESR123FH"
  "action" : "CRUD400000"
}
```

**dateTime**

Date and time when the event occurred.

**source**

Configured external system reference that uniquely identifies the source of the event, for example, Watson™ Care Manager. This value is optional and might not be set.

**originalSource**

Configured external system reference that uniquely identifies the original source system where the event occurred for the very first time, for example, Quest Diagnostics. This value is optional and might not be set.

**url**

URL for the correct API to use to retrieve the data. **Important:** The URL does not contain the entire path and must be prefixed with a valid Watson™ Care Manager production instance URL. Sample prefix path: `https://{{watson-care-manager-URL}}/{{tenant-instance}}`.

**type**

Code for the data type that is subscribed to. The external system identifies the event that relates to the notification by its type.

- WHDT130000 - Client Status Data

**Note:**

The client status data subscription triggers a notification when a client is deleted in Watson™ Care Manager.

- WHDT130001 - Share Care Plan
- WHDT130002 - Program
- WHDT130003 - Client Data Type
- WHDT130004 - External Referral
- WHDT130005 - Assessment
- WHDT130006 - Questionnaire
- WHDT130007 - External Inquiry
- WHDT130008 - External Messaging

**externalSystemReference**

Configured external system reference that uniquely identifies a client data type that the subscription relates to. Only displayed for messages that relate to configurable client data type updates.

#### **action**

Code for the action that generated the event. For example, Create, Read, Update, or Delete.

- `CRUD400000` - Create
- `CRUD400001` - Read
- `CRUD400002` - Update
- `CRUD400003` - Delete



#### **Note:**

If `source` and `originalSource` values are available, you can determine whether to retrieve data based on where the event occurred. For example, your third-party application might send data updates to Watson™ Care Manager through another Watson™ Care Manager API. If your application is also subscribed to notifications for the data type, Watson™ Care Manager will notify you about the update when your application already has the latest version of the data. Therefore, you might decide to only retrieve data updates that occurred in another application.

---

#### **Related information**

[External system reference identifiers \(on page 422\)](#)

## Retrieving data updates

To retrieve the data updates, you must use a suitable API from the Watson™ Care Manager REST API catalog. Currently, only certain APIs are supported for use with webhooks.

See the [Watson Care Manager REST API catalog \(on page 448\)](#) for the APIs that are supported for use with webhook notifications.

## Watson™ Care Manager REST API catalog

The available REST APIs are documented here in Swagger so that you can review and try out the API calls before you integrate your application with Watson Care Manager.

## Alerts API

Use this API to receive alerts in Watson™ Care Manager when specific information that could influence care management is recorded for a client in the external system.

[Try it out \(on page 454\)](#)

## Assessments API

Use this API to share completed client assessment data between an external system and Watson™ Care Manager.

**Before you begin:** To see the REST API calls for a configured assessment, you must download the API document for the assessment in the Administration application. Then, open the downloaded file in a Swagger editor (Version 2.0) to see the available calls. For more information, see [Sharing the API document for an assessment \(on page 49\)](#).

## Care Plan API

This API can be called only after receiving a webhooks notification that relates to a Share Care Plan event.

**Before you begin:** Before you can retrieve a client's care plan via this API, you must first subscribe to notifications for the Share Care Plan data type. For more information, see [Configuring subscribers and managing subscriptions \(on page 279\)](#). Two API calls are required.

First, the Get Care Plan Metadata API provides the metadata related to the share care plan event and a call-back URL to retrieve the PDF document for the client. Then, the Get Care Plan Report as PDF API uses the returned URL to generate and return the PDF.

[Try it out \(on page 477\)](#)

## Care Team Actions API

Use this API to receive an action from an external system that a required care team role must do for client who is registered in Watson™ Care Manager. Care team actions help a client to achieve their goals and enhance their behavior, skills, or overall well-being.

[Try it out \(on page 489\)](#)

## Client Deletions and Reversals API

Use this API to expose client deletions and reversals that occur in Watson Care Manager to any external system that is integrated with Watson™ Care Manager.

[Try it out \(on page 514\)](#)

## Client Registration API

Use this API to receive a client registration in Watson™ Care Manager from an external system, which includes the client's demographic, contact, and identification information.

[Try it out \(on page 524\)](#)

## Configurable Client Data API

Use this API to share configurable client data that is created, updated, and deleted for a client in an external system with Watson™ Care Manager. In addition, you can use this API to retrieve updates to configurable client data from Watson™ Care Manager (via webhooks).

Before you begin: To see the REST API calls for a configurable client data type, you must download its API document in the Administration application. Then, open the downloaded file in a Swagger editor (Version 2.0) to see the available calls. For more information, see [Sharing the API document for a client data type \(on page 189\)](#).



### Note:

You can make a GET call only after receiving a webhooks notification that relates to a configurable client data type. For more information, see [Configuring subscribers and managing subscriptions \(on page 279\)](#).

## Contact: Address API

Use this API to share a client's address data that is created, updated, or deleted in an external system with Watson™ Care Manager.

[Try it out \(on page 553\)](#)

## Contact: Telecoms API

Use this API to share a client's phone or email contact data that is created, updated, or deleted in an external system with Watson™ Care Manager.

[Try it out \(on page 592\)](#)

## Demographics: Client Demographics API

Use this API to receive updates to a client's demographic details in Watson™ Care Manager from a external system, which includes a client's date of birth, date of death, marriage, gender, and status.

[Try it out \(on page 626\)](#)

## Demographics: Identification API

Use this API to share a client's identification data that is created, updated, or deleted in an external system with Watson™ Care Manager.

[Try it out \(on page 646\)](#)

## Demographics: Name API

Use this API to share a client's name that is created, updated, or deleted in an external system with Watson™ Care Manager.

[Try it out \(on page 676\)](#)

## Demographics: Tag API

Use this API to share a client's tag data that is created, updated, or deleted in an external system with Watson™ Care Manager.

[Try it out \(on page 722\)](#)

## External Messaging API

Use this API to facilitate external messaging between Watson™ Care Manager and external systems. Care team members can send messages associated with clients through Watson™ Care Manager, and the external messaging API makes the messages available to external systems, such as the client's external portal. Similarly, clients can send messages from their external portals, and the external messaging API makes the messages available for viewing in Watson™ Care Manager to clients' care teams. You must enable external messaging to allow the exchange of messages between Watson™ Care Manager and the client's external portal. For more information, see [Enabling the external messaging feature \(on page 238\)](#).

[Try it out \(on page 708\)](#)

## External Provider: Contact API

Use this API to share provider contact records that are created, updated, or deleted in an external system with Watson™ Care Manager.

[Try it out \(on page 745\)](#)

## External Provider: Fee API

Use this API to retrieve provider services inquiries that are created for a client in Watson™ Care Manager.

[Try it out \(on page 759\)](#)

## External Provider: Inquiry API

Use this API to share provider service inquiries that are created in Watson Care Manager with an external system. The external system can update the inquiries and send the update to Watson™ Care Manager.

**Before you begin:** To retrieve a client's provider service inquiries using this API, you must first subscribe to notifications for the External Inquiries type. For more information, see [Configuring subscribers and managing subscriptions \(on page 279\)](#).

[Try it out \(on page 772\)](#)

## External Provider: Location API

Use this API to share provider location records that are created, updated, or deleted in an external system with Watson™ Care Manager.

[Try it out \(on page 783\)](#)

## External Provider: Provider API

Use this API to share provider records that are created, updated, or closed in an external system with Watson™ Care Manager.

[Try it out \(on page 798\)](#)

## External Provider: Service API

Use this API to share provider service offering records that are created, updated, closed, or reopened in an external system with Watson™ Care Manager.



### Note:

You can only reopen a closed service offering for an active provider.

[Try it out \(on page 811\)](#)

## Federated Users API

### Federated Users API

Use this API to create federated user accounts in Watson™ Care Manager that are stored in an identity provider system so that the identity provider can authenticate the user's access to Watson™ Care Manager.

[Try it out \(on page 829\)](#)

## Notes API

Use this API to share client notes and deletions that are recorded in an external system for a client who is registered in Watson™ Care Manager. In addition, you can use this API to retrieve the latest notes information for clients.

[Try it out \(on page 836\)](#)

## Program API

This API can be called only after receiving a webhooks notification that relates to a Program Status event.

**Before you begin:** Before you can retrieve a client's program details via this API, you must first subscribe to notifications for the Program data type. For more information, see [Configuring subscribers and managing subscriptions \(on page 279\)](#).

[Try it out \(on page 862\)](#)

## Questionnaires API

Use this API to share completed client questionnaire data between an external system and Watson™ Care Manager.

**Before you begin:** To see the REST API calls for a configured questionnaire, you must download the API document for the questionnaire in the Administration application. Then, open the downloaded file in a Swagger editor (Version 2.0) to see the available calls. For more information, see [Sharing the API document for a questionnaire \(on page 77\)](#).

## Referrals API

Use this API to receive open unassigned referrals (including suggested programs) that are captured in the external system for a client who is registered in Watson™ Care Manager.

[Try it out \(on page 869\)](#)

## Alerts API

Version:v1

By using the protected APIs that follow, you can create and update alert notifications for the care team when specific information that could influence care management is recorded for a client in the external system. For example, a care team member might be alerted in Watson Care Manager when a client is arrested and charges are entered in the external system.

### Servers

`https://host/Rest`

API methods: Create an alert.

#### POST /v1/ees/flags

Create alerts for a client who is registered in Watson Care Manager.

Create a client alert based on an event in the external system that initiates a transfer of valid data to Watson Care Manager.

#### Example request

CURL

```
curl -X POST "https://host:port/Rest/v1/ees/flags" -H "accept: application/json" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Content-Type: application/json" -d "{\"resourceType": "Flag", "id": "12345679", "source": { "coding": [ { "system": "http://wcm/source", "code": "T123" } ], "text": "Source" }, } "originalSource": { "coding": [ { "system": "http://wcm/originalsource", "code": "wcm123" } ], "text": "OriginalSource" }, } "identifier": [ { "value": "1198", "type": { "text": "CourtSystem" } } ] }, } "status": "active", "category": { "coding": [ { "system": "http://wcm/alerttype", "code": "BP123" } ], "text": "Arrested" }, } "code": { "text": "Individual has been arrested by County updated" }, } } "subject": { "reference": "Patient/identifier=Passport & Driving licence, identifierValue=P123" }, } "priority": "critical", "notifyRole": { "coding": [ { "system": "http://wcm/careteamroles", "code": "CM123" } ] } } ] } } ] } } }
```

JAVA

```

HttpServletResponse response = Unirest.post("https://host:port/Rest/v1/ees/flags")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
    .header("Content-Type", "application/json")
    .body(" {"resourceType": "Flag", "id": "12345679", "source": { "coding": [{ "system": "http://wcm/source", "code": "T123" }], "text": "Source" }, } "originalSource": { "coding": [ { "system": "http://wcm/originalsource", "code": "wcm123" } ], "text": "OriginalSource" }, } "identifier": [{ "value": "1198", "type": { "text": "CourtSystem" } } ], } "status": "active", "category": { "coding": [ { "system": "http://wcm/alerttype", "code": "BP123" }], "text": "Arrested" }, } "code": { "text": "Individual has been arrested by County updated" }, } } "subject": { "reference": "Patient/identifier=Passport & Driving licence, identifierValue=P123" }, } "priority": "critical", "notifyRole": { "coding": [ { "system": "http://wcm/careteamroles", "code": "CM123" } ] } } ] } } })
    .asString();

```

## Parameters

### **Referer(header)**

**type** string

array curam://foundational.app

**required** true

## X-WCM-TENANT-ID(*header*)

**type** string

**array** The tenant ID.

**required** true

**X-WCM-TENANT-INSTANCE**(header)

**type** string

**array** The tenant instance.

**required** true**Authorization**(*header*)**type** string**array** The Access Token.**required** true**X-GRANT-TYPE**(*header*)**type** string**array** client\_credentials**required** true**Request body**

The inbound message that contains the information required to create an alert.

**Required:**true**Media types****application/json****Schema** [NewAlertEntry](#)*(on page**465)***Responses****201**

The post request was successful.

**Headers**

Name	Description	Schema
Location	The location of the new resource.	<b>type</b> string

**400**

The data request is invalid. Check the error message for further information and resend the request with the corrected data. The possible error codes are - EESERR420 - It is mandatory

to specify 'priority'. EESERR421 - It is mandatory to specify 'source'. EESERR422 - It is mandatory to specify 'status'. EESERR423 - It is mandatory to specify 'category'. EESERR424 - It is mandatory to specify 'code'. EESERR425 - Invalid 'status' entered. EESERR426 - Invalid 'system' entered for 'category'. EESERR427 - Invalid 'system' entered for 'notifyRole'. EESERR428 - Invalid 'priority' entered. EESERR429 - Invalid 'code' entered for 'category'. EESERR430 - Invalid 'code' entered for 'notifyRole'. EESERR431 - The note for this alert has a status of 'Canceled'. A comment must not be added to a 'Canceled' note. EESERR432 - The 'text' entered for 'code' is too long, maximum allowed characters is 2000. EESERR433 - Alerts created by WCM users can not be updated by external system API. EESERR434 - Attributes of an alert with Inactive status can not be updated except 'text' associated with 'code'. EESERR435 - Invalid 'resourceType' entered. EESERR436 - Mismatch in category specified at the time of creation and the category specified during update. EESERR437 - The 'source' entered is too long, maximum allowed is 100. EESERR438 - The 'originalSource' entered is too long, maximum allowed is 100. EESERR439 - Invalid 'system' entered for 'source'. EESERR440 - Invalid 'code' entered for 'source'. EESERR441 - It is mandatory to specify 'code' for 'source'. EESERR442 - Invalid 'system' entered for 'originalSource'. EESERR443 - Invalid 'code' entered for 'originalSource'.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 476](#))

#### 500

An internal server error occurred. Contact your administrator for more information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 476](#))

#### default

An unexpected error occurred. Check the error message for further information.

#### Media types

**application/json**

**Schema DefaultErrorModel***(on page 476)***API methods: Update an alert.****PUT /v1/ees/flags**

Updates alerts for a client who is registered in Watson Care Manager.

Updates a specific client alert in Watson Care Manager that matches the record ID sent from an external system. If no matching record is found when the external system initiates a transfer of data to Watson Care Manager, Watson Care Manager creates a new alert for the client.

**Example request****CURL**

```
curl -X POST "https://host:port/Rest/v1/ees/flags" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Content-Type: application/json" -d "{\"resourceType": "Flag", "id": "12345679", "source": { "coding": [ { "system": "http://wcm/source", "code": "T123" } ], "text": "Source" }, } "originalSource": { "coding": [ { "system": "http://wcm/originalsource", "code": "wcm123" } ], "text": "OriginalSource" }, } "identifier": [ { "value": "1198", "type": { "text": "CourtSystem" } } ], } ] } "status": "active", "category": { "coding": [ { "system": "http://wcm/alerttype", "code": "BP123" } ], "text": "Arrested" }, } "code": { "text": "Individual has been arrested by County updated" }, } } "subject": { "reference": "Patient/identifier=Passport & Driving licence, identifierValue=P123" }, } "priority": "critical", "notifyRole": { "coding": [ { "system": "http://wcm/careteamroles", "code": "CM123" } ] } ] } ] } ] } ] } ] }
```

**JAVA**

```
HttpResponse response = Unirest.post("https://host:port/Rest/v1/ees/flags")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
    .header("Content-Type", "application/json")
```

```

.body(" {"resourceType": "Flag", "id": "12345679", "source": { "coding": [{ "system": "http://wcm/source",
"code": "T123" }], "text": "Source" }, } "originalSource": { "coding": [ { "system": "http://wcm/originalsource",
"code": "wcm123" } ], "text": "OriginalSource" }, } "identifier": [{ "value": "1198", "type": { "text":
"CourtSystem" } }], } "status": "active", "category": { "coding": [{ "system": "http://wcm/alerttype", "code":
"BP123" }], "text": "Arrested" }, } "code": { "text": "Individual has been arrested by County updated" }, } }
"subject": { "reference": "Patient/identifier=Passport & Driving licence, identifierValue=P123" }, } "priority":
"critical", "notifyRole": { "coding": [{ "system": "http://wcm/careteamroles", "code": "CM123" }] } } ] } } ]
} }) .asString();

```

## Parameters

### **Referer**(*header*)

**type** string

**array** curam://foundational.app

**required** true

### **X-WCM-TENANT-ID**(*header*)

**type** string

**array** The tenant ID.

**required** true

### **X-WCM-TENANT-INSTANCE**(*header*)

**type** string

**array** The tenant instance.

**required** true

### **Authorization**(*header*)

**type** string

**array** The Access Token.

**required** true

### **X-GRANT-TYPE**(*header*)

```
type string  
array client_credentials  
  
required true
```

## Request body

The inbound message that contains the information required to create an alert.

**Required:**true

### Media types

**application/json**

**Schema** [ModifiedAlertEntry](#)  
([on page 470](#))

## Responses

**200**

The put request was successful.

### Media types

**application/json**

**Schema** [ModifiedAlertEntry](#)  
([on page 470](#))

**400**

The data request is invalid. Check the error message for further information and resend the request with the corrected data. The possible error codes are- EESERR420 - It is mandatory to specify 'priority'. EESERR421 - It is mandatory to specify 'source'. EESERR422 - It is mandatory to specify 'status'.EESERR423 - It is mandatory to specify 'category'.EESERR424 - It is mandatory to specify 'code'.EESERR425 - Invalid 'status' entered. EESERR426- Invalid 'system' entered for 'category'. EESERR427 - Invalid 'system' entered for 'notifyRole'. EESERR428 - Invalid 'priority' entered. EESERR429 - Invalid 'code' entered for 'category'.EESERR430 - Invalid 'code' entered for 'notiyfRole'. EESERR431- The note for this alert has a status of 'Canceled'. A comment must not be added to a 'Canceled' note. EESERR432 - The 'text' entered for 'code' is too long, maximum allowed characters is 2000. EESERR433 - Alerts created by WCM users can not be updated by external system API.EESERR434 - Attributes of an alert with

Inactive status can not be updated except 'text' associated with 'code'. EESERR435 - Invalid 'resourceType' entered. EESERR436 - Mismatch in category specified at the time of creation and the category specified during update. EESERR437 - The 'source' entered is too long, maximum allowed is 100. EESERR438 - The 'originalSource' entered is too long, maximum allowed is 100. EESERR439 - Invalid 'system' entered for 'source'. EESERR440 - Invalid 'code' entered for 'source'. EESERR441 - It is mandatory to specify 'code' for 'source'. EESERR442 - Invalid 'system' entered for 'originalSource'. EESERR443 - Invalid 'code' entered for 'originalSource'.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 476)*

**500**

An internal server error occurred. Contact your administrator for more information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 476)*

**default**

An unexpected error occurred. Check the error message for further information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 476)*

## API methods: Update alert (by ID)

**PUT /v1/ees/flags/{id}**

Updates alerts for a client who is registered in Watson Care Manager.

Updates a specific client alert in Watson Care Manager that matches the record ID sent from an external system. If no matching record is found when the external system initiates a transfer of data to Watson Care Manager, Watson Care Manager creates a new alert for the client.

### Example request

CURL:

```
curl -X POST "https://host:port/Rest/v1/ees/flags/{id}" -H "accept: application/json" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Content-Type: application/json" -d "{\"resourceType": \"Flag\", \"id\": \"12345679\", \"source\": { \"coding\": [{ \"system\": \"http://wcm/source\", \"code\": \"T123\" }], \"text\": \"Source\" }, \"originalSource\": { \"coding\": [ { \"system\": \"http://wcm/originalsource\", \"code\": \"wcm123\" } ], \"text\": \"OriginalSource\" }, \"identifier\": [{ \"value\": \"1198\", \"type\": { \"text\": \"CourtSystem\" } }]}, \"status\": \"active\", \"category\": { \"coding\": [{ \"system\": \"http://wcm/alerttype\", \"code\": \"BP123\" }], \"text\": \"Arrested\" }, \"code\": { \"text\": \"Individual has been arrested by County updated\" }, } } \"subject\": { \"reference\": \"Patient/identifier=Passport & Driving licence, identifierValue=P123\" }, \"priority\": \"critical\", \"notifyRole\": { \"coding\": [{ \"system\": \"http://wcm/careteamroles\", \"code\": \"CM123\" }] } } ] } } } } }
```

JAVA

```
HttpResponse response = Unirest.post("https://host:port/Rest/v1/ees/flags/{id}")

.header("accept", "application/json")

.header("Authorization", "access_token")

.header("X-GRANT-TYPE", "client_credentials")

.header("X-WCM-TENANT-INSTANCE", "Tenant Instance")

.header("X-WCM-TENANT-ID", "Tenant ID")

.header("Referer", "curam://foundational.app")

.header("Content-Type", "application/json")

.body(" {\"resourceType\": \"Flag\", \"id\": \"12345679\", \"source\": { \"coding\": [{ \"system\": \"http://wcm/source\", \"code\": \"T123\" }], \"text\": \"Source\" }, \"originalSource\": { \"coding\": [ { \"system\": \"http://wcm/originalsource\", \"code\": \"wcm123\" } ], \"text\": \"OriginalSource\" }, \"identifier\": [{ \"value\": \"1198\", \"type\": { \"text\": \"CourtSystem\" } }]}, \"status\": \"active\", \"category\": { \"coding\": [{ \"system\": \"http://wcm/alerttype\", \"code\": \"BP123\" }], \"text\": \"Arrested\" }, \"code\": { \"text\": \"Individual has been arrested by County updated\" }, } } \"subject\": { \"reference\": \"Patient/identifier=Passport & Driving licence, identifierValue=P123\" }, \"priority\":
```

```
"critical", "notifyRole": { "coding": [{ "system": "http://wcm/careteamroles", "code": "CM123" }] } ] } ] } ] } ] }
```

## Parameters

### **Referer**(*header*)

**type** string  
**array** curam://foundational.app  
**required** true

### **X-WCM-TENANT-ID**(*header*)

**type** string  
**array** The tenant ID.  
**required** true

### **X-WCM-TENANT-INSTANCE**(*header*)

**type** string  
**array** The tenant instance.  
**required** true

### **Authorization**(*header*)

**type** string  
**array** The Access Token.  
**required** true

### **X-GRANT-TYPE**(*header*)

**type** string  
**array** client\_credentials  
**required** true

### **id**(*path*)

Internal record ID/WCM ID of the alert.

**type** string

**required** true

## Request body

The inbound message that contains the information required to create an alert.

**Required:**true

**Media types**

application/json

**Schema** [ModifiedAlertEntry](#)

(*on page 470*)

## Responses

**200**

The put request was successful.

**Media types**

application/json

**Schema** [ModifiedAlertEntry](#)

(*on page 470*)

**400**

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

**Media types**

application/json

**Schema** [DefaultErrorModel](#)

(*on page 476*)

**500**

An internal server error occurred. Contact your administrator for more information.

**Media types**

**application/json**

**Schema** [DefaultModelError](#)

([on page 476](#))

**default**

An unexpected error occurred. Check the error message for further information.

**Media types**

**application/json**

**Schema** [DefaultModelError](#)

([on page 476](#))

## Components

### Schemas

#### NewAlertEntry

**Properties**

**resourceType** string

**description**

All alerts are of resource type flag. This is a mandatory field.

**maxLength** 300

**id** string

**description**

Internal record ID of the alert. This is an optional field.

**status** string

**description**

Alert status - active,inactive. This is a mandatory field.

**maxLength** 300

**priority** string

**description**

Priority of the alert - low, medium, high, critical. This is a mandatory field.

	<b>maxLength</b>	300
<b>category</b>	object	
	<b>description</b>	Stores the external system reference of the alert that indicates the alert type. This is a mandatory field.
	<b>\$ref</b>	<a href="#">NewAlertCategory (on page 470)</a>
<b>code</b>	object	
	<b>description</b>	Note associated with the alert. It is a mandatory field.
	<b>\$ref</b>	<a href="#">NewAlertCode (on page 468)</a>
<b>notifyRole</b>	object	
	<b>description</b>	Stores the external system reference of the care team roles that are to be notified of the alert. This is an optional field.
	<b>\$ref</b>	<a href="#">NewAlertRoles (on page 467)</a>
<b>source</b>	object	
	<b>description</b>	Contains the source details. System and code corresponding to the Source of the note. System would be http://wcm/sourcecode would be the external system reference of the Source. This is a mandatory field.
	<b>\$ref</b>	<a href="#">NewCodeableConceptPR (on page 469)</a>
<b>originalSource</b>	object	
	<b>description</b>	Contains the original source system details. System and code corresponding to the Original Source System of the note. System would be http://wcm/originalsourcecode would be the external system reference of the Original Source System. This is an optional field.
	<b>\$ref</b>	<a href="#">NewCodeableConceptPR (on page 469)</a>
<b>identifier</b>	array	
	<b>items \$ref</b>	<a href="#">NewIdentifier (on page 468)</a>

**Stores the external record id of the alert. This is an optional field.**

**description**

Stores the external record id of the alert. This is an optional field.

**subject** object

**description**

Stores the identification details of the client for whom the alert is created. This is a mandatory field.

**\$ref** [NewSubject \(on page 469\)](#)

**type** object

**array** priority

## NewAlertRoles

### Properties

**coding** array

**items \$ref** [NewCoding](#)

*(on page  
467)*

**type** object

## NewCoding

### Properties

**system** string

**maxLength** 900

**description**

Should be http://wcm/alerttype when used within category and http://wcm/careteamroles when used within notifyRole.

**code** string

**maxLength** 900

**description**

Stores the external system reference of the alert when used within category, and the external system reference of the care team role when used within notifyRole. When used in the context of source systems, it represents the external system reference for the source or original source as applicable.

**type** object

## NewIdentifier

### Properties

**value** string

**description**

Optional. Stores the external record id of the alert.

**maxLength** 900

**type** object

**description**

Optional. This object holds the value for the Identifier type.

**\$ref** [NewCodeableConcept \(on page 468\)](#)

**type** object

## NewCodeableConcept

### Properties

**text** string

**description**

Optional. This attribute holds the value for the Identification type. It must be provided if an identifier value is provided.

**maxLength** 900

**type** object

## NewAlertCode

### Properties

**text** string

**maxLength** 30720

**type** object

## NewSubject

### Properties

**reference** string

**maxLength** 150

**type** object

## NewCodeableConceptPR

### Properties

**text** string

**maxLength** 900

**coding** array

**items \$ref** NewCodingPR

*(on page  
469)*

**type** object

## NewCodingPR

### Properties

**system** string

**maxLength** 900

**code** string

**maxLength** 900

**type** object

## NewAlertCategory

### Properties

**text** string

**maxLength** 900

**coding** array

**items \$ref** NewCoding

*(on page  
467)*

**type** object

## ModifiedAlertEntry

### Properties

**resourceType** string

**description**

All alerts are of resource type flag. This is a mandatory field.

**maxLength** 300

**id** string

**description**

Internal record ID of the alert. This is an optional field if identifier is specified.

**status** string

**description**

Alert status - active, inactive. This is a mandatory field.

**maxLength** 300

**priority** string

**description**

Priority of the alert - low, medium, high, critical. This is a mandatory field.

**maxLength** 300

**category** object

	<b>description</b>	Stores the external system reference of the alert that indicates the alert type. This is a mandatory field.
	<b>\$ref</b>	<a href="#">ModifiedAlertCategory (on page 475)</a>
<b>code</b>	object	
	<b>description</b>	Note associated with the alert. This is a mandatory field.
	<b>\$ref</b>	<a href="#">ModifiedAlertCode (on page 473)</a>
<b>notifyRole</b>	object	
	<b>description</b>	Stores the external system reference of the care team roles that are to be notified of the alert. This is an optional field.
	<b>\$ref</b>	<a href="#">ModifiedAlertRoles (on page 472)</a>
<b>source</b>	object	
	<b>description</b>	Contains the source details.System and code corresponding to the Source of the note.System would be http://wcm/sourcecode would be the external system reference of the Source. This is a mandatory field.
	<b>\$ref</b>	<a href="#">ModifiedCodeableConceptPR (on page 475)</a>
<b>originalSource</b>	object	
	<b>description</b>	Contains the original source system details.System and code corresponding to the Original Source System of the note.System would be http://wcm/originalsourcecode would be the external system reference of the Original Source System. This is an optional field.
	<b>\$ref</b>	<a href="#">ModifiedCodeableConceptPR (on page 475)</a>
<b>identifier</b>	array	
	<b>description</b>	Optional. Stores the external record id of the alert. This is an optional field if id is specified.

**items**      [\\$ref ModifiedIdentifier](#)  
*(on page 472)*

**subject**      object

**description**      Stores the identification details of the client for whom the alert is created. This is a mandatory field.

**\$ref**      [ModifiedSubject \(on page 473\)](#)

**type** object

**array** priority

## ModifiedAlertRoles

### Properties

**coding** array

**items** [\\$ref ModifiedCoding](#)  
*(on page  
472)*

**type** object

## ModifiedCoding

### Properties

**system** string

**maxLength** 900

**code** string

**maxLength** 900

**type** object

## ModifiedIdentifier

### Properties

**value** string

**description**

Optional. External record ID of the alert.

**maxLength** 900

**type** object

**description**

Opional. This object holds the value for the Identifier type.

**\$ref**

[ModifiedCodeableConcept \(on page 473\)](#)

**type** object

## ModifiedCodeableConcept

### Properties

**text** string

**description**

Optional. This attribute holds the value for the Identification type. It must be provided if an identifier value is provided.

**maxLength** 900

**type** object

## ModifiedAlertCode

### Properties

**text** string

**maxLength** 30720

**type** object

## ModifiedSubject

### Properties

**reference** string

**description**

The Subject object is used to identify an individual in Watson Care Manager. The "reference" String is expected to contain identifier details that will be used to match an individual in Watson Care Manager. The string is parsed to extract query parameters and associated values. It can contain a combination of (1) WCM Patient ID (i.e. WCM Reference Number), (2) WCM Identification External System Reference and Identification number, (3) WCM Identification Type and Identification number, (4) WCM Identification External System Reference and Identification number and birthDate, (5) WCM Identification Type and Identification number and birthDate.

For example:

## (1) WCM Patient ID

```
"subject":{  
    "reference" : "patient/123      " }
```

## (2) WCM Identification External System Reference and Identification number

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239"}
```

## (3) WCM Identification External System Reference and Identification number,

```
"subject":{  
    "reference" : "patient/identifier=Passport, identifiervalue=239" }
```

## (4) WCM Identification External System Reference and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239,  
    birthDate=19380821" }
```

## (5) WCM Identification Type and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=Passport, identifiervalue=239,  
    birthDate=19380821" }
```

**maxLength** 150

**type** object

## ModifiedCodeableConceptPR

### Properties

**text** string

**maxLength** 900

**coding** array

**items \$ref** ModifiedCodingPR

*(on page 475)*

**type** object

## ModifiedCodingPR

### Properties

**system** string

**maxLength** 900

**code** string

**maxLength** 900

**type** object

## ModifiedAlertCategory

### Properties

**text** string

**maxLength** 900

**coding** array

**items \$ref** ModifiedCoding

*(on page  
472)*

**type** object

## DefaultModelError

### Properties

**Error** array

**items \$ref** Error (*on*

*page*

*476*)

**type** object

## Error

### Properties

**code** integer(*int32*)

**description**

A machine-readable code that identifies the problem. This code does not vary with the Accept-Language setting.

**message** string

**description**

A human-readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text may change over time.

**level** string

**description**

The level of the error.

**type** object

**required**

- code
- message
- level

## Care Plan API

Version:v1

By using the protected APIs that follow, you can retrieve a client's care plan in PDF format so that extended care team members (who are not Watson Care Manager users) can view their client's care plan in an external system. Two API calls are necessary to retrieve the client's care plan PDF. The first API call to Get Care Plan Metadata returns the 'Share With' values and the 'Note' details along with a URL to get the Share Care Plan PDF. The second call to Get Care Plan Report triggers the SHARE CARE PLAN event in Watson Care Manager that generates and returns the PDF to subscribers. Watson Care Manager uses webhooks to notify subscribers so that they can call back for the Share Care Plan PDF. The notification is triggered by an action of the Care Manager in the application, when they click "Send" in the Share Care Plan modal.

### Servers

`https://host/Rest`

API methods: Get care plan metadata

`GET /v1/ees/sharecareplan_sharewith/{id}`

Get metadata about the care plan.

A Watson Care Manager client might experience changes of circumstances in their care plan, for example, risk factors, assessments, social network contacts and so on. In this case, a Watson Care Manager user can generate the client's care plan in Watson Care Manager, select external entities with whom to share the client's care plan, add a note with relevant information, and send a notification to the external systems that are subscribing to the Share Care Plan data type. The external system receives a notification with a URL that contains the ID of the generated Care Plan. For example, if the ID of the Care Plan is 123, the url contained in the notification is /Rest/v1/ees/sharecareplan\_sharewith/123. The external system must call this URL to receive the care plan "share with" and "note" metadata, and the URL to get the care plan in a PDF format. See the Get care plan report as PDF API that follows this API.

### Example request

cURL

```
curl -X GET "https://host:port/Rest/v1/ees/sharecareplan_sharewith/123" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "accept: application/json"
```

JAVA

```
HttpResponse response = Unirest.get("https://host:port/Rest/v1/ees/sharecareplan_sharewith/123")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .asString();
```

## Parameters

### **Referer(header)**

**type** string  
**array** curam://foundational.app  
**required** true

### **X-WCM-TENANT-ID(header)**

**type** string  
**array** The tenant ID.  
**required** true

### **X-WCM-TENANT-INSTANCE(header)**

**type** string  
**array** The tenant instance.  
**required** true

### **Authorization(header)**

**type** string

**array** The Access Token.

**required** true

**X-GRANT-TYPE**(*header*)

**type** string

**array** client\_credentials

**required** true

**id**(*path*)

The Care Plan resource id, which uniquely identifies the Care Plan report.

**type** integer

**required** true

## Responses

**200**

The Get request was successful.

**Media types**

**application/json**

**Schema** [ShareCarePlanWithDetails](#)

(*on page 484*)

**400**

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error message:

EESERR903 - Errors occurred on retrieving Share Care Plan metadata.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

(*on page 488*)

## 401

Invalid authentication credentials for the target resource entered.

### Media types

**application/json**

**Schema** [DefaultModelError](#)

*(on page 488)*

## 404

The resource requested was not found. Check the error message for more information and resend the request with a valid resource id.

Possible error message:

EESERR900 - Share Care Plan metadata not found.

### Media types

**application/json**

**Schema** [DefaultModelError](#)

*(on page 488)*

## 500

An internal server error occurred. Contact your administrator for more information.

### Media types

**application/json**

**Schema** [DefaultModelError](#)

*(on page 488)*

## default

An unexpected error occurred. Check the error message for more information.

### Media types

**application/json**

**Schema** [DefaultModelError](#)

*(on page 488)*

## API methods: Get care plan report as PDF

### GET /v1/ees/sharecareplan/{id}

Get the Care Plan report as a PDF.

The first API call to Get Care Plan Metadata is generated by a Watson Care Manager user when they click Send in the Share Care Plan modal. The Get Care Plan Report as PDF API uses the URL that is returned in the first API call to generate and return the PDF to subscribers. This API returns a PDF that contains a client's Care Plan as configured by the Watson Care Manager user.

#### Example request

CURL

```
curl -X GET "https://host:port/Rest/v1/ees/sharecareplan/123" -H "X-WCM-TENANT-ID: Tenant ID" -H
"X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H
"accept: application/octet-stream" --output careplan_name.pdf
```

JAVA

```
HttpResponse<InputStream> response = Unirest.get("https://host:port/Rest/v1/ees/sharecareplan/123")
    .header("accept", "application/octet-stream")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .asBinary();
```

## Parameters

### Referer(header)

**type** string

**array** curam://foundational.app

**required** true

### X-WCM-TENANT-ID(header)

**type** string

**array** The tenant ID.

**required** true

**X-WCM-TENANT-INSTANCE**(*header*)

**type** string

**array** The tenant instance.

**required** true

**Authorization**(*header*)

**type** string

**array** The Access Token.

**required** true

**X-GRANT-TYPE**(*header*)

**type** string

**array** client\_credentials

**required** true

**id**(*path*)

The Care Plan resource id, which uniquely identifies the Care Plan report.

**type** integer

**required** true

## Responses

### 200

The Get request was successful.

#### Media types

**application/octet-stream**

**Schema** [ShareCarePlanPDF](#)

(on page 484)

### 400

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error message:

EESERR902 - Errors occurred on downloading the Share Care Plan.

#### **Media types**

**application/octet-stream**

**Schema** [DefaultErrorModel](#)

*(on page 488)*

#### **401**

Invalid authentication credentials for the target resource entered.

#### **Media types**

**application/octet-stream**

**Schema** [DefaultErrorModel](#)

*(on page 488)*

#### **404**

The resource requested was not found. Check the error message for more information and resend the request with a valid resource id.

Possible error message:

EESERR901 - Share Care Plan not found.

#### **500**

An internal server error occurred. Contact your administrator for more information.

#### **Media types**

**application/octet-stream**

**Schema** [DefaultErrorModel](#)

*(on page 488)*

#### **default**

An unexpected error occurred. Check the error message for more information.

## Media types

**application/octet-stream**

**Schema** [DefaultErrorModel](#)

(*on page 488*)

## Components

### Schemas

#### ShareCarePlanPDF

##### Properties

**data** string(*byte*)

**description**

The Care Plan report in a PDF format.

**maxLength** 512000

**fileName** string

**description**

The filename that is associated with  
the Care Plan report in PDF format.

**maxLength** 2000

**type** object

**required**

- data
- fileName

#### ShareCarePlanWithDetails

##### Properties

**id** integer

**description**

The Care Plan resource id.

This id uniquely identifies the Care Plan instance for which the details are requested.

**note** string

**description**

A note that is added by the Watson Care Manager user.

When sending a notification to external systems, the Watson Care Manager user might want to add details about the Care Plan they are sharing in a free text format.

**maxLength** 2000

**url** string

**description**

The URL to use for a GET request to retrieve the Care Plan report in a PDF format.

For example, if the id of the Care Plan is 123, the url is

/Rest/v1/ees/sharecareplan/123

**maxLength** 300

**originator** string

**description**

The originator field contains the name of the Watson Care Manager user who sent the notification to external systems.

**maxLength** 64

**shareWith** \$ref [CodeableConceptSCP](#)

([on page 486](#))

**template** \$ref [CodeableConceptTN](#)

([on page 487](#))

**type** object

**required**

- id
- url
- template

## CodeableConceptSCP

### Properties

**coding** array

**description**

Representation of a Share With value.

When creating a Care Plan report and sending a notification to external systems, the Watson Care Manager user can select a number of entities that the Care Plan can be shared with.

The Share With values are configured by an Administrator user in Watson Care Manager. The Administrator user can configure an external system reference for each Share With value. If an External System Reference is configured, this is returned to the external system.

**items** \$ref [CodingSCP](#)  
*(on page 486)*

**type** object

## CodingSCP

### Properties

**code** string

**description**

The External System Reference for the Share With value as configured in Watson Care Manager by an Administrator user.

**maxLength** 20

**display** string

**description**

The display value of the Share With entry. This field contains the value as it is displayed in the application to the Watson Care Manager user.

**maxLength** 100

**system** string

**description**

The system that the code belongs to. External System Reference codes are codes that are configured in Watson Care Manager. Therefore the system for a Share With value is always [http://wcm/sharecareplan\\_sharewith](http://wcm/sharecareplan_sharewith) .

**maxLength** 150**array** http://wcm/sharecareplan\_sharewith**type** object**CodeableConceptTN****Properties****text** string**description**

The Watson Care Manager Care Plan template name. When creating a Care Plan report to be shared with external systems, the WCM user must select a Share Care Plan template. Templates are configured by an Administrator user.

**maxLength** 100**coding** array**maxItems** 1**description**

Representation of the External System References for the selected Share Care Plan template.

**items** \$ref CodingTN

*(on page  
487)*

**type** object**array** text**CodingTN****Properties****system** string

**description**

The system that the code belongs to. External System Reference codes are codes configured in Watson Care Manager. Therefore, the system for a Template name value is always `http://wcm/sharecareplan_template`.

**maxLength** 150

**array** `http://wcm/sharecareplan_template`

**code** string

**description**

External System Reference for the Template name. The external system reference is configured in Watson Care Manager by an Administrator user. Not yet available, so the value returned is empty.

**maxLength** 20

**type** object

## DefaultModelError

### Properties

**Error** array

```
items $ref Error (on  
page  
488)
```

**type** object

## Error

### Properties

**code** integer(`int32`)

**description**

A machine-readable code that identifies the problem. This does not vary with the Accept-Language setting.

**message** string

**description**

A human-readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text may change over time.

**level** string

**description**

The level of the error

**type** object

**required**

- code
- message
- level

## Care Team Actions API

Version:v1

By using the protected APIs that follow, you can send actions from an external system to a specific care team role in Watson Care Manager so that the assigned role can take the action on behalf of the client to help them achieve their goals. The API sends an assigned care team role an action with a valid reason and an expected completion date. The client is identified when Watson Care Manager receives the WCM client ID or the external ID and type. In Watson Care Manager, goals are mandatory to create an action. Watson Care Manager links the inbound care team action to default goal. Each time an action is received for the client, the default goal is reused provided it already exists on the client's care plan. Otherwise, a new goal is created and linked to the action.

A completed action that is received by the external system can be updated to include completion details.

### Servers

**<https://host/Rest>**

### API methods: Create a care team action

## POST /v1/ees/goalActions

Create an action for a client who is registered in Watson Care Manager and assign the action to a specific care team role to complete.

Creates a care team action record based on an event in the external system that initiates a transfer of valid data to Watson Care Manager.

### Example request

#### CURL

```
curl -X POST "https://host:port/Rest/v1/ees/goalActions" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "accept: application/json" -H "Referer: curam//foundational.app" -H "Content-Type: application/json" -d
{
  "resourceType": "goalaction",
  "id": "123456",
  "identifier": [
    {
      "value": "1234",
      "type": {
        "text": "Intervention System"
      }
    }
  ],
  "actionName": "Action Name",
  "startDate": "",
  "completionDate": "",
  "reason": "Test Reason adding for action through update action api test test test",
  "subject": {
    "reference": "Patient/identifier=Reference Number, identifierValue=28416"
  },
  "action": {
    "coding": [
      {
        "system": "http://wcm/action",
        "code": "TestAction"
      }
    ],
    "text": "Action"
  },
  "source": {
    "coding": [
      {
        "system": "http://wcm/source",
        "code": "chart123"
      }
    ],
    "text": "Source"
  },
  "originalSource": {
    "coding": [
      {
        "system": "http://wcm/originalsource",
        "code": "wcm123"
      }
    ],
    "text": "OriginalSource"
  },
  "role": {
    "coding": [
      {
        "system": "http://wcm/careteamroles",
        "code": "Cm"
      }
    ]
  },
  "expectedEndDate": "",
  "completionComment": "completed",
  "outcome": "successful",
  "category": "appointment"
}
```

#### JAVA

```
HttpResponse response = Unirest.post("https://host:port/Rest/v1/ees/flags")
  .header("accept", "application/json")
  .header("Authorization", "access_token")
  .header("X-GRANT-TYPE", "client_credentials")
  .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
  .header("X-WCM-TENANT-ID", "Tenant ID")
  .header("Referer", "curam://foundational.app")
  .header("Content-Type", "application/json")
  .body(
    {
      "resourceType": "goalaction",
      "id": "123456",
      "identifier": [
        {
          "value": "1234",
          "type": {
            "text": "Intervention System"
          }
        }
      ],
      "actionName": "Action name",
      "startDate": "2018-09-01",
      "completionDate": "",
      "reason": "Test Reason adding for action through update action api test test test",
      "subject": {
        "reference": "Patient/identifier=Reference Number, identifierValue=28416"
      },
      "action": {
        "coding": [
          {
            "system": "http://wcm/action",
            "code": "TestAction"
          }
        ],
        "text": "Action"
      },
      "source": {
        "coding": [
          {
            "system": "http://wcm/source",
            "code": "chart123"
          }
        ],
        "text": "Source"
      },
      "originalSource": {
        "coding": [
          {
            "system": "http://wcm/originalsource",
            "code": "wcm123"
          }
        ],
        "text": "OriginalSource"
      },
      "role": {
        "coding": [
          {
            "system": "http://wcm/careteamroles",
            "code": "Cm"
          }
        ]
      },
      "expectedEndDate": "",
      "completionComment": "completed",
      "outcome": "successful",
      "category": "appointment"
    }
  )
  .asJson();
```

```
"Source"}, "originalSource": {"coding": [{"system": "http://wcm/originalsource", "code": "wcm123"}], "text": "OriginalSource"}, "role": {"coding": [{"system": "http://wcm/careteamroles", "code": "Cm"}]}, "expectedEndDate": "", "completionComment": "completed", "outcome": "successful", "category": "appointment"}).asString();
```

## Parameters

### **Referer**(*header*)

**type** string  
**array** curam://foundational.app  
**required** true

### **X-WCM-TENANT-ID**(*header*)

**type** string  
**array** The tenant ID.  
**required** true

### **X-WCM-TENANT-INSTANCE**(*header*)

**type** string  
**array** The tenant instance.  
**required** true

### **Authorization**(*header*)

**type** string  
**array** The Access Token.  
**required** true

### **X-GRANT-TYPE**(*header*)

**type** string  
**array** client\_credentials  
**required** true

## Request body

The inbound message that contains the information required to create an action.

**Required:**true

### Media types

application/json

**Schema** [NewGoalActionEntry](#)

(*on page 502*)

## Responses

**201**

The post request was successful

### Headers

Name	Description	Schema
Location	The location of the new resource	<b>type</b> string

**400**

The data request is invalid. Check the error message for further information and resend the request with the corrected data. Possible error messages: EESERR800 - It is mandatory to specify 'source'. EESERR802 - The 'actionName' entered is too long, maximum allowed is 100. EESERR804 - The 'text' entered for 'reason' is too long, maximum allowed characters is 2000. EESERR805 - The 'source' entered is too long, maximum allowed is 100. EESERR806 - The 'originalSource' entered is too long, maximum allowed is 100. EESERR807 - Invalid 'resourceType' entered. EESERR808 - The 'text' entered for 'action comment' is too long, maximum allowed characters is 2000. EESERR809 - It is mandatory to specify 'actionName' or 'code' for 'action'. EESERR810 - 'action name' and 'action external reference' are not matching. EESERR812 - Invalid 'code' entered for 'action'. EESERR814 - Invalid 'outcome' entered. EESERR815 - Invalid 'category' entered. EESERR816 - Invalid 'system' entered for 'role'. EESERR817 - Invalid 'code' entered for 'role'. EESERR818 - Invalid 'system' entered for 'source'. EESERR819 - Invalid 'code' entered for 'source'. EESERR820 - Invalid 'system' entered for 'originalSource'. EESERR821 - Invalid 'code' entered for 'originalSource'. EESERR822 - Invalid 'code' entered for 'source'. EESERR823 - Invalid 'code' entered for 'originalSource'. EESERR825 - Invalid 'system' entered for 'action'. EESERR826 - 'completionDate' must be on or after the

'startDate. EESERR827 - There are no care team members currently on the client to assign the care team action to. EESERR828 - The action is already updated by a care team in Watson Care Manager, and cannot be further updated. EESERR829 - The configured action name cannot be updated. EESERR830 - The Action is already completed. You can only update completion details - Completion Date, Outcome and Completion Comments. EESERR831 - The Action is already cancelled. EESERR832 - The action code that was originally specified does not match the updated action code.

**Media types****application/json****Schema** [ModelError](#)*(on page 513)***500**

An internal server error occurred. Contact your administrator for more information

**Media types****application/json****Schema** [ModelError](#)*(on page 513)***default**

An unexpected error occurred. Check the error message for further information

**Media types****application/json****Schema** [ModelError](#)*(on page 513)*

## API methods: Update a care team action

**PUT /v1/ees/goalActions**

Updates a care team action for a client who is registered in Watson Care Manager.

Updates a care team action record based on an event in the external system that initiates a transfer of valid data to Watson Care Manager. Only completion details (Completed On, Outcome, Completed Comments) can be updated if the care team action is complete. If the external system sends a care team action update that is already updated internally by a Watson Care Manager user (via row-level actions Edit, Assign To, Delete, Complete, Update Completion Details), the care team action record cannot be further updated via the API.

## Example request

CURL

```
curl -X PUT "https://host:port/Rest/v1/ees/goalActions" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "accept: application/json" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Referer: curam//foundational.app" -H "Content-Type: application/json" -d
{
  "resourceType": "goalaction",
  "id": "123456",
  "identifier": [
    {
      "value": "1234",
      "type": {
        "text": "Intervention System"
      }
    }
  ],
  "actionName": "Action Name",
  "startDate": "",
  "completionDate": "",
  "reason": "Test Reason adding for action through update action api test test test",
  "subject": {
    "reference": "Patient/identifier=Reference Number, identifierValue=28416"
  },
  "action": {
    "coding": [
      {
        "system": "http://wcm/action",
        "code": "TestAction"
      }
    ],
    "text": "Action",
    "source": {
      "coding": [
        {
          "system": "http://wcm/source",
          "code": "chart123"
        }
      ],
      "text": "Source"
    },
    "originalSource": {
      "coding": [
        {
          "system": "http://wcm/originalsource",
          "code": "wcm123"
        }
      ],
      "text": "OriginalSource"
    },
    "role": {
      "coding": [
        {
          "system": "http://wcm/careteamroles",
          "code": "Cm"
        }
      ]
    },
    "expectedEndDate": "",
    "completionComment": "completed",
    "outcome": "successful",
    "category": "appointment"
  }
}
```

JAVA

```
HttpResponse response = Unirest.put("https://host:port/Rest/v1/ees/flags")
  .header("accept", "application/json")
  .header("Authorization", "access_token")
  .header("X-GRANT-TYPE", "client_credentials")
  .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
  .header("X-WCM-TENANT-ID", "Tenant ID")
  .header("Referer", "curam://foundational.app")
  .header("Content-Type", "application/json")
  .body(
    {
      "resourceType": "goalaction",
      "id": "123456",
      "identifier": [
        {
          "value": "1234",
          "type": {
            "text": "Intervention System"
          }
        }
      ],
      "actionName": "Action name",
      "startDate": "2018-09-01",
      "completionDate": "",
      "reason": "Test Reason adding for action through update action api test test test",
      "subject": {
        "reference": "Patient/identifier=Reference Number, identifierValue=28416"
      },
      "action": {
        "coding": [
          {
            "system": "http://wcm/action",
            "code": "TestAction"
          }
        ],
        "text": "Action",
        "source": {
          "coding": [
            {
              "system": "http://wcm/source",
              "code": "chart123"
            }
          ],
          "text": "Source"
        }
      }
    }
  )
  .asJson();
```

```
"Source"}, "originalSource": {"coding": [{ "system": "http://wcm/originalsource", "code": "wcm123"}], "text": "OriginalSource"}, "role": {"coding": [{"system": "http://wcm/careteamroles", "code": "Cm"}]}, "expectedEndDate": "", "completionComment": "completed", "outcome": "successful", "category": "appointment"}).asString();
```

## Parameters

### **Referer**(*header*)

**type** string  
**array** curam://foundational.app  
**required** true

### **X-WCM-TENANT-ID**(*header*)

**type** string  
**array** The tenant ID.  
**required** true

### **X-WCM-TENANT-INSTANCE**(*header*)

**type** string  
**array** The tenant instance.  
**required** true

### **Authorization**(*header*)

**type** string  
**array** The Access Token.  
**required** true

### **X-GRANT-TYPE**(*header*)

**type** string  
**array** client\_credentials  
**required** true

## Request body

The inbound message that contains the information required to create an action.

**Required:**true

### Media types

**application/json**

**Schema** [ModifiedGoalActionEntry](#)

(*on page 507*)

## Responses

**200**

The put request was successful

### Media types

**application/json**

**Schema** [ModifiedGoalActionEntry](#)

(*on page 507*)

**400**

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error messages:

EESERR800 - It is mandatory to specify 'source'. EESERR802 - The 'actionName' entered is too long, maximum allowed is 100. EESERR804 - The 'text' entered for 'reason' is too long, maximum allowed characters is 2000. EESERR805 - The 'source' entered is too long, maximum allowed is 100. EESERR806 - The 'originalSource' entered is too long, maximum allowed is 100. EESERR807 - Invalid 'resourceType' entered. EESERR808 - The 'text' entered for 'action comment' is too long, maximum allowed characters is 2000.

EESERR809 - It is mandatory to specify 'actionName' or 'code' for 'action'. EESERR810 - 'action name' and 'action external reference' are not matching. EESERR812 - Invalid 'code' entered for 'action'. EESERR814 - Invalid 'outcome' entered. EESERR815 - Invalid 'category' entered. EESERR816 - Invalid 'system' entered for 'role'. EESERR817 - Invalid 'code' entered for 'role'. EESERR818 - Invalid 'system' entered for 'source'. EESERR819 - Invalid 'code' entered for

'source'. EESERR820 - Invalid 'system' entered for 'originalSource'. EESERR821 - Invalid 'code' entered for 'originalSource'. EESERR822 - Invalid 'code' entered for 'source'. EESERR823 - Invalid 'code' entered for 'originalSource'. EESERR825 - Invalid 'system' entered for 'action'. EESERR826 - 'completionDate' must be on or after the 'startDate'. EESERR827 - There are no care team members currently on the client to assign the care team action to. EESERR828 - The action is already updated by a care team in Watson Care Manage , and cannot be further updated. EESERR829 - The configured action name cannot be updated. EESERR830 - The Action is already completed. You can only update completion details - Completion Date, Outcome and Completion Comments. EESERR831 - The Action is already cancelled. EESERR832 - The action code that was originally specified does not match the updated action code.

#### Media types

**application/json**

**Schema DefaultErrorModel**

(*on page 513*)

#### 500

An internal server error occurred. Contact your administrator for more information.

#### Media types

**application/json**

**Schema DefaultErrorModel**

(*on page 513*)

#### default

An unexpected error occurred. Check the error message for more information.

#### Media types

**application/json**

**Schema DefaultErrorModel**

(*on page 513*)

## API methods: Update a care team action (by ID)

## PUT /v1/ees/goalActions/{id}

Updates a care team action for a client who is registered in Watson Care Manager.

Updates a specific care team action in Watson Care Manager that matches the record ID sent from an external system. Only completion details (Completed On, Outcome, Completed Comments) can be updated if the care team action is complete. If the external system sends a care team action update that is already updated internally by a Watson Care Manager user (via row-level actions Edit, Assign To, Delete, Complete, Update Completion Details), the care team action record cannot be further updated via the API.

### Example request

#### CURL

```
curl -X PUT "https://host:port/Rest/v1/ees/goalActions" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Content-Type: application/json" -d "{\"resourceType\":\"goalaction\",\"id\": \"123456\",\"identifier\": [{\"value\": \"1234\",\"type\": {\"text\": \"Intervention System\"}}],\"actionName\": \"Action Name\",\"startDate\": \"\",\"completionDate\": \"\", \"reason\": \"Test Reason adding for action through update action api test test test\", \"subject\": {\"reference\": \"Patient/identifier=Reference Number, identifierValue=28416\"},\"action\": {\"coding\": [{\"system\": \"http://wcm/action\", \"code\": \"TestAction\"}],\"text\": \"Action\" }, \"source\": {\"coding\": [{\"system\": \"http://wcm/source\", \"code\": \"chart123\"}],\"text\": \"Source\"},\"originalSource\": {\"coding\": [{\"system\": \"http://wcm/originalsource\", \"code\": \"wcm123\"}], \"text\": \"OriginalSource\"},\"role\": {\"coding\": [{\"system\": \"http://wcm/careteamroles\", \"code\": \"Cm\"}]} ,\"expectedEndDate\": \"\",\"completionComment\": \"completed\", \"outcome\": \"successful\", \"category\": \"appointment\"}
```

#### JAVA

```
HttpResponse response = Unirest.put("https://host:port/Rest/v1/ees/flags")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
    .header("Content-Type", "application/json")
    .body("{\"resourceType\":\"goalaction\",\"id\": \"123456\",\"identifier\": [{\"value\": \"1234\",\"type\": {\"text\": \"Intervention System\"}}],\"actionName\": \"Action name\",\"startDate\": \"2018-09-01\", \"completionDate\": \"\", \"reason\": \"Test Reason adding for action through update action api test test test\", \"subject\": {\"reference\": \"Patient/identifier=Reference
```

```

Number, identifierValue=28416"},"action": {"coding": [{"system": "http://wcm/action","code": "TestAction"}],"text": "Action" }, "source": {"coding": [{"system": "http://wcm/source","code": "chart123"}]}, "text": "Source"}, "originalSource": {"coding": [{"system": "http://wcm/originalsource","code": "wcm123"}]}, "text": "OriginalSource"}, "role": {"coding": [{"system": "http://wcm/careteamroles","code": "Cm"}]}}, "expectedEndDate": "", "completionComment": "completed", "outcome": "successful", "category": "appointment"}).asString();

```

## Parameters

### **Referer(header)**

**type** string  
**array** curam://foundational.app  
**required** true

### **X-WCM-TENANT-ID(header)**

**type** string  
**array** The tenant ID.  
**required** true

### **X-WCM-TENANT-INSTANCE(header)**

**type** string  
**array** The tenant instance.  
**required** true

### **Authorization(header)**

**type** string  
**array** The Access Token.  
**required** true

### **X-GRANT-TYPE(header)**

**type** string  
**array** client\_credentials  
**required** true

**id(path)**

Internal record ID/WCM ID of the action.

**type** string

**required** true

## Request body

The inbound message that contains the information required to create an action.

**Required:**true

**Media types**

application/json

**Schema** [ModifiedGoalActionEntry](#)

([on page 507](#))

## Responses

### 200

The put request was successful

**Media types**

application/json

**Schema** [ModifiedGoalActionEntry](#)

([on page 507](#))

### 400

The data request is invalid. Check the error message for more information and resend the request with the corrected data. Possible error messages: EESERR800 - It is mandatory to specify 'source'. EESERR802 - The 'actionName' entered is too long, maximum allowed is 100. EESERR804 - The 'text' entered for 'reason' is too long, maximum allowed characters is 2000. EESERR805 - The 'source' entered is too long, maximum allowed is 100. EESERR806 - The 'originalSource' entered is too long, maximum allowed is 100. EESERR807 - Invalid 'resourceType' entered. EESERR808 - The 'text' entered for 'action comment' is too long, maximum allowed characters is 2000.

EESERR809 - It is mandatory to specify 'actionName' or 'code' for 'action'. EESERR810 - 'action name' and 'action external reference' are not matching. EESERR812 - Invalid 'code' entered for 'action'. EESERR814 - Invalid 'outcome' entered. EESERR815 - Invalid 'category' entered. EESERR816 - Invalid 'system' entered for 'role'. EESERR817 - Invalid 'code' entered for 'role'. EESERR818 - Invalid 'system' entered for 'source'. EESERR819 - Invalid 'code' entered for 'source'. EESERR820 - Invalid 'system' entered for 'originalSource'. EESERR821 - Invalid 'code' entered for 'originalSource'. EESERR822 - Invalid 'code' entered for 'source'. EESERR823 - Invalid 'code' entered for 'originalSource'. EESERR825 - Invalid 'system' entered for 'action'. EESERR826 - 'completionDate' must be on or after the 'startDate'. EESERR827 - There are no care team members currently on the client to assign the care team action to. EESERR828 - The action is already updated by a care team in Watson Care Manage , and cannot be further updated. EESERR829 - The configured action name cannot be updated. EESERR830 - The Action is already completed. You can only update completion details - Completion Date, Outcome and Completion Comments. EESERR831 - The Action is already cancelled. EESERR832 - The action code that was originally specified does not match the updated action code.

#### Media types

**application/json**

**Schema DefaultErrorModel**

*(on page 513)*

## 500

An internal server error occurred. Contact your administrator for more information.

#### Media types

**application/json**

**Schema DefaultErrorModel**

*(on page 513)*

## default

An unexpected error occurred. Check the error message for more information.

#### Media types

**application/json**

**Schema DefaultErrorModel**

*(on page 513)*

## Components

### Schemas

#### NewGoalActionEntry

##### Properties

**resourceType** string

**description**  
Resource type is always goalaction.

**maxLength** 300

**id** string

**description**  
Internal record ID/WCM ID of the action.

**actionName** string

**description**  
Action name.

**maxLength** 250

**completionComment** string

**description**  
Action completion comment.

**maxLength** 2000

**reason** string

**description**  
Action reason.

**maxLength** 2000

**category** string

**description**  
Category of the action  
-appointment, coaching,  
coordination, education,  
individualtask, other,

	referral,reunification, screening, tracking
	<b>maxLength</b> 300
<b>startDate</b>	string( <i>date</i> )
	<b>description</b> Action start date.
<b>expectedEndDate</b>	string( <i>date</i> )
	<b>description</b> Action expected end date.
<b>completionDate</b>	string( <i>date</i> )
	<b>description</b> Action completion date.
<b>outcome</b>	string
	<b>description</b> Outcome of the action - successful, unsuccessful, pending, abandoned
	<b>maxLength</b> 300
<b>action</b>	object
	<b>\$ref</b> <a href="#">NewActionExternalReference</a> (on page 506)
<b>originalSource</b>	object
	<b>\$ref</b> <a href="#">NewActionOriginalSource</a> (on page 506)
<b>source</b>	object
	<b>\$ref</b> <a href="#">NewActionSource</a> (on page 506)
<b>role</b>	object
	<b>\$ref</b> <a href="#">NewCareTeamRole</a> (on page 505)
<b>identifier</b>	array

**description**  
Optional. The Identifier object holds values of an external identifier for the enclosing record. The external system can provide up to 3 identifiers per record. Identifier objects can be used to create and update records.

**items**      **\$ref** [NewIdentifier](#)  
*(on page 504)*

**subject**      object

**description**  
A Subject object stores the reference to the Patient that the record belongs to.

**\$ref**      [NewSubject \(on page 505\)](#)

**type** object

## NewIdentifier

### Properties

**value** string

**description**  
Optional This attribute stores the external identifier value. If provided, a type.text value must be provided.

**maxLength** 900

**type** object

**description**  
Optional. This object stores the value for the Identifier type.

**\$ref**      [NewCodeableConcept \(on page 505\)](#)

**type** object

## NewCodeableConcept

### Properties

**text** string

**description**

Optional. This attribute stores the value for the Identification type. It must be provided if an identifier value is provided.

**maxLength** 900

**type** object

## NewCareTeamRole

### Properties

**text** string

**maxLength** 900

**coding** array

**items \$ref** NewCoding

*(on page  
505)*

**type** object

## NewCoding

### Properties

**system** string

**maxLength** 900

**code** string

**maxLength** 900

**type** object

## NewSubject

### Properties

**reference** string

**maxLength** 150

**type** object

## NewActionExternalReference

### Properties

**text** string

**maxLength** 900

**coding** array

**items \$ref** NewCoding

*(on page  
505)*

**type** object

## NewActionSource

### Properties

**text** string

**maxLength** 900

**coding** array

**items \$ref** NewCoding

*(on page  
505)*

**type** object

## NewActionOriginalSource

### Properties

**text** string

**maxLength** 900

**coding** array

**items \$ref** NewCoding

(*on page*  
505)

**type** object

## ModifiedGoalActionEntry

### Properties

**resourceType** string

**description**  
Resource type is always goalaction.

**maxLength** 300

**id** string

**description**  
Internal record ID/WCM ID of the action.

**actionName** string

**description**  
Action name.

**maxLength** 250

**completionComment** string

**description**  
Action completion comment.

**maxLength** 2000

**reason** string

**description**  
Action reason.

**maxLength** 2000

**category** string

**description**  
Category of the action  
-appointment, coaching,  
coordination, education,

	individualtask, other, referral, reunification, screening, tracking
	<b>maxLength</b> 300
<b>startDate</b>	string( <i>date</i> )
	<b>description</b> Action start date.
<b>expectedEndDate</b>	string( <i>date</i> )
	<b>description</b> Action expected end date.
<b>completionDate</b>	string( <i>date</i> )
	<b>description</b> Action completion date.
<b>outcome</b>	string
	<b>description</b> Outcome of the action - successful, unsuccessful, pending, abandoned
	<b>maxLength</b> 300
<b>action</b>	object
	<b>\$ref</b> <a href="#">ModifiedActionExternalReference</a> (on page 512)
<b>originalSource</b>	object
	<b>\$ref</b> <a href="#">ModifiedActionOriginalSource</a> (on page 512)
<b>source</b>	object
	<b>\$ref</b> <a href="#">ModifiedActionSource</a> (on page 512)
<b>role</b>	object
	<b>\$ref</b> <a href="#">ModifiedCareTeamRole</a> (on page 510)
<b>identifier</b>	array

**description**

Optional. The Identifier object stores values of an external identifier for the enclosing record. The external system can provide up to 3 identifiers per record. Identifier objects can be used to create and update records.

**items**

**\$ref** [ModifiedIdentifier \(on page 509\)](#)

**subject**

object

**description**

A Subject object stores the reference to the Patient that the record belongs to.

**\$ref**

[ModifiedSubject \(on page 510\)](#)

**type** object

**ModifiedIdentifier****Properties**

**value** string

**description**

Optional This attribute stores the external identifier value. If provided, a type.text value must be provided.

**maxLength** 900

**type** object

**description**

Opional. This object stores the value for the Identifier type.

**\$ref**

[ModifiedCodeableConcept \(on page 509\)](#)

**type** object

**ModifiedCodeableConcept****Properties**

**text** string

**description**

Optional. This attribute stores the value for the Identification type. It must be provided if an identifier value is provided.

**maxLength** 900

**type** object

## ModifiedCareTeamRole

### Properties

**text** string

**maxLength** 900

**coding** array

**items \$ref** ModifiedCoding

*(on page  
510)*

**type** object

## ModifiedCoding

### Properties

**system** string

**maxLength** 900

**code** string

**maxLength** 900

**type** object

## ModifiedSubject

### Properties

**reference** string

**description**

The Subject object is used to identify an individual in Watson Care Manager. The "reference" String is expected to contain identifier details that will be used to match an individual in Watson Care Manager. The string is parsed to extract query parameters and associated values. It can contain a combination of (1) WCM Patient ID (i.e. WCM Reference Number), (2) WCM Identification External System Reference and Identification number, (3) WCM Identification Type and Identification number, (4) WCM Identification External System Reference and Identification number and birthDate, (5) WCM Identification Type and Identification number and birthDate.

For example:

## (1) WCM Patient ID

```
"subject":{  
    "reference" : "patient/123      " }
```

## (2) WCM Identification External System Reference and Identification number

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239"}
```

## (3) WCM Identification External System Reference and Identification number,

```
"subject":{  
    "reference" : "patient/identifier=Passport, identifiervalue=239" }
```

## (4) WCM Identification External System Reference and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239,  
    birthDate=19380821" }
```

## (5) WCM Identification Type and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=Passport, identifiervalue=239,  
    birthDate=19380821" }
```

**maxLength** 150

**type** object

## ModifiedActionExternalReference

### Properties

**text** string

**maxLength** 900

**coding** array

**items \$ref** ModifiedCoding

*(on page  
510)*

**type** object

## ModifiedActionSource

### Properties

**text** string

**maxLength** 900

**coding** array

**items \$ref** ModifiedCoding

*(on page  
510)*

**type** object

## ModifiedActionOriginalSource

### Properties

**text** string

**maxLength** 900

**coding** array

**items \$ref** ModifiedCoding

(*on page*  
510)

**type** object

## DefaultModelError

### Properties

**Error** array

**items \$ref** Error (*on*  
*page*  
513)

**type** object

## Error

### Properties

**code** integer(*int32*)

**description** A machine-readable code that identifies the problem. This does not vary with the Accept-Language setting.

**message** string

**description** A human-readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text may change over time.

**level** string

**description** The level of the error.

**type** object

**required**

- code
- message
- level

## Client Deletions and Reversals API

Version:v2

By using the protected APIs , you can retrieve a list of individuals who were deleted in Watson Care Manager and whose deletions were reversed.

### Servers

`http://host/Rest`

#### API methods: Get deleted client list

`GET /v2/ees/list/clients/deletedClients`

Get all deleted clients.

Retrieve all individuals who were deleted in Watson Care Manager.

### Parameters

**Referer**(*header*)

**type** string

**array** curam://foundational.app

**required**true

**X-WCM-TENANT-ID**(*header*)

**type** string

**array**The tenant ID.

**required**true

**X-WCM-TENANT-INSTANCE**(*header*)

**type** string

**array** The tenant instance.

**required** true

#### **Authorization(header)**

**type** string

**array** The Access Token.

**required** true

#### **X-GRANT-TYPE(header)**

**type** string

**array** client\_credentials

**required** true

#### **since(query)**

The date from which you want to return records for the deleted clients. Specify dates in ISO 8601 combined format. The default returns the entire results set. Example - YYYYMMDDTHHMMSS. Sample - 20170824T141417.

**type** string

**maxLength** 20

**required** false

## Responses

### 200

The get request was successful.

#### Media types

**application/json**

**Schema** [DClientListResponse](#)

(on page 519)

### 400

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

**Media types**

**application/json**

**Schema** [ModelError](#)

*(on page 522)*

**401**

Invalid authentication credentials for the target resource entered.

**Media types**

**application/json**

**Schema** [ModelError](#)

*(on page 522)*

**500**

An internal server error occurred. Contact your administrator for more information.

**Media types**

**application/json**

**Schema** [ModelError](#)

*(on page 522)*

**default**

An unexpected error occurred. Check the error message for further information.

**Media types**

**application/json**

**Schema** [ModelError](#)

*(on page 522)*

## API methods: Get reversed client deletions list

## GET /v2/ees/list/clients/reversedClients

Get all clients whose deletions were reversed.

Retrieve all clients who were deleted in Watson Care Manager and whose deletions were subsequently reversed.

### Parameters

#### **Referer**(*header*)

**type** string  
**array** curam://foundational.app  
**required** true

#### **X-WCM-TENANT-ID**(*header*)

**type** string  
**array** The tenant ID.  
**required** true

#### **X-WCM-TENANT-INSTANCE**(*header*)

**type** string  
**array** The tenant instance.  
**required** true

#### **Authorization**(*header*)

**type** string  
**array** The Access Token.  
**required** true

#### **X-GRANT-TYPE**(*header*)

**type** string  
**array** client\_credentials  
**required** true

**since(query)**

The date from which you want to return records for the deletion reversed clients. Specify dates in ISO 8601 combined format. The default returns the entire results set. Example - YYYYMMDDTHHMMSS. Sample - 20170824T141417.

**type** string

**maxLength** 20

**required** false

## Responses

### 201

The get request was successful

**Media types**

**application/json**

**Schema** [DClientListResponse](#)

*(on page 519)*

### 400

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 522)*

### 401

Invalid authentication credentials for the target resource entered.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 522)*

## 500

An internal server error occurred. Contact your administrator for more information

### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 522)*

### default

An unexpected error occurred. Check the error message for further information

### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 522)*

## Components

### Schemas

#### DClientListResponse

##### Properties

**dtls** object

**\$ref** [DClientListResponseDetails](#)

*(on page 520)*

**client** array

**items** **\$ref** [DClientResponse](#)

*(on page 520)*

**reversedClient** array

**items** **\$ref** [DRClientResponse](#)

*(on page 521)*

**type** object

## DClientListResponseDetails

### Properties

**description** string  
**endDateTime** string  
  
**maxLength** 20  
  
**startDateTime** string  
  
**maxLength** 20

**type** object

## DClientResponse

### Properties

**concernRoleName** string  
  
**description**  
The "concernRoleName" represents the name of the deleted client.  
  
**maxLength** 150  
  
**dateOfBirth** string(*date*)  
  
**description**  
The "dateOfBirth" represents the date of birth of the deleted client. Accepted format is yyyy-MM-dd.  
  
**reason** string  
  
**description**  
The "reason" attribute is used to describe the reason for which the client is deleted.  
  
**enum**

- Client Request
- Other

  
**maxLength** 50  
  
**deletedDateTime** string(*datetime*)

**description**

The "deletedDateTime" attribute is used to describe the exact datetime when the client was deleted.

**maximum** 99991231**userName** string**description**

The "userName" attribute is used to describe the user who deleted the client.

**maxLength** 200**type** object**DRClientResponse****Properties****dateOfBirth** string(*date*)**description**

The "dateOfBirth" represents the date of birth of the client whose deletion is reversed. Accepted format is yyyy-MM-dd.

**reason** string**description**

The "reason" attribute is used to describe the reason for which the client is deleted.

**enum**

- Deleted in error
- Other

**maxLength** 50**userName** string**description**

The "userName" attribute is used to describe the user who reverted the client deletion.

**maxLength** 200**reversedDateTime** string(*datetime*)

**description**

The "reversedDateTime" attribute is used to describe the exact datetime when the client deletion was reversed.

**maximum** 99991231

**concernRoleName** string

**description**

The "concernRoleName" represents the name of the client whose client deletion is reversed.

**maxLength** 150

**type** object

## DefaultModelError

### Properties

**Error** array

```
items $ref Error (on  
page  
522)
```

**type** object

## Error

### Properties

**code** integer(int32)

**description**

A machine readable code identifying the problem. This will not vary with the Accept-Language setting

**message** string

**description**

A human readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text may change over time

**level** string

**description**

The level of the error

**type** object

**required**

- code
- message
- level

**CodeTableType****Properties**

**tableName** string

**description**

Read only. The name of the code table

**readOnly** true

**value** string

**description**

The code value associated with a code table entry

**maxLength** 10

**description** string

**description**

Read only. The description of the code. Based on the language set in the 'Accept-Language' header, a localized description may be returned

**readOnly** true

**parentCodeTable** string

**description**

Read only. The parent codetable of this codetable, if this codetable is part of a hierarchy

**readOnly** true

**type** object

**array** value

## Frequency

### Properties

**value** string

**description**

The code value representation of the frequency

**description** string

**description**

Read only. The localized text description of the frequency code value

**readOnly** true

**type** object

**array** value

## Client Registration API

Version:v1

By using the protected APIs that follow, you can send a client registration from an external system to Watson Care Manager with their demographic details, contact details and identifications. Data in Watson Care Manager is an accurate reflection of the external system and the need for the care team to manually register the client in Watson Care Manager is eliminated.

### Servers

**host/Rest**

API methods: Register a client

**POST /v1/ees/individuals**

Create a client registration in Watson Care Manager.

Register a client in Watson Care Manager based on an update in the external system that initiates a transfer of valid data to Watson Care Manager.

### Example request

cURL

```
curl -X POST "https://host:port/Rest/v1/ees/individuals" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Content-Type: application/json" -d "[ { \"resourceType\": \"Patient\", \"active\": true, \"gender\": \"male\", \"birthDate\": \"1970-01-03\", \"deceasedBoolean\": false, \"deceasedDate\": \"\", \"source\": { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, \"originalSource\": { \"text\": \"Mentioned by client\", \"coding\": [ { \"system\": \"http://wcm/originalsource\", \"code\": \"DEF\" } ] }, \"address\": [ { \"use\": \"home\", \"state\": \"NY\", \"country\": \"US\", \"source\": { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, \"originalSource\": { \"text\": \"Mentioned by client\", \"coding\": [ { \"system\": \"http://wcm/originalsource\", \"code\": \"DEF\" } ] }, \"city\": \"New York\", \"line1\": \"31\", \"line2\": \"Park Avenue\", \"line3\": \"\", \"postalCode\": \"12345678\", \"identifier\": [ { \"value\": \"123\", \"type\": { \"text\": \"ExternalIdentifier\" } } ], \"period\": { \"start\": \"2019-01-03\", \"end\": \"\" } } ], \"maritalStatus\": { \"coding\": [ { \"system\": \"http://hl7.org/fhir/v3/MaritalStatus\", \"code\": \"D\" } ] }, \"period\": { \"start\": \"2019-01-03\", \"end\": \"\" } }, \"telecom\": [ { \"system\": \"phone\", \"value\": \"090909\", \"use\": \"home\", \"source\": { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, \"originalSource\": { \"text\": \"Mentioned by client\", \"coding\": [ { \"system\": \"http://wcm/originalsource\", \"code\": \"DEF\" } ] }, \"identifier\": [ { \"value\": \"456\", \"type\": { \"text\": \"ExternalIdentifier\" } } ], \"period\": { \"start\": \"2019-01-03\", \"end\": \"\" } } ], \"name\": [ { \"use\": \"official\", \"family\": \"Smith\", \"given\": \"Carl\", \"prefix\": \"\", \"suffix\": \"\", \"middle\": \"\", \"source\": { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, \"originalSource\": { \"text\": \"Mentioned by client\", \"coding\": [ { \"system\": \"http://wcm/originalsource\", \"code\": \"DEF\" } ] }, \"identifier\": [ { \"value\": \"789\", \"type\": { \"text\": \"ExternalIdentifier\" } } ], \"period\": { \"start\": \"2019-01-03\", \"end\": \"\" } } ], \"identifier\": [ { \"value\": \"12349876\", \"source\": { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, \"originalSource\": { \"text\": \"Mentioned by client\", \"coding\": [ { \"system\": \"http://wcm/originalsource\", \"code\": \"DEF\" } ] }, \"type\": { \"coding\": [ { \"system\": \"http://wcm/identification\", \"code\": \"GHIL\" } ] }, \"period\": { \"start\": \"2019-01-03\", \"end\": \"\" } }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] } ], \"headerSources\": { \"birthDeathSource\": { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] } ], \"genderSource\": { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] } ], \"maritalStatusSource\": { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] } ], \"birthDeathOriginalSource\": { \"text\": \"Mentioned by client\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] } }
```

```
[ { \\"system\": \\"http://wcm/originalsource\", \\"code\": \\"DEF\\\" } ] }, \\"genderOriginalSource\":
{ \\"text\": \\"Mentioned by client\\\", \\"coding\": [ { \\"system\": \\"http://wcm/originalsource\", \\"code\":
\\\"DEF\\\" } ] }, \\"maritalStatusOriginalSource\": { \\"text\": \\"Mentioned by client\\\", \\"coding\": [ { \\"system\":
\\\"http://wcm/originalsource\", \\"code\": \\"DEF\\\" } ] } } }
```

JAVA

```
HttpResponse response = Unirest.post("https://host:port/Rest/v1/ees/individuals")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
    .header("Content-Type", "application/json")
    .body("{ \\"resourceType\": \\"Patient\\\", \\"active\": true, \\"gender\": \\"male\\\", \\"birthDate\": \\"1970-01-03\\",
    \\"deceasedBoolean\": false, \\"deceasedDate\": \"\", \\"source\": { \\"text\": \\"Office\\\", \\"coding\": [ { \\"system\":
    \\"http://wcm/source\\\", \\"code\": \\"ABC\\\" } ] }, \\"originalSource\": { \\"text\": \\"Mentioned by client\\",
    \\"coding\": [ { \\"system\": \\"http://wcm/originalsource\\\", \\"code\": \\"DEF\\\" } ] }, \\"address\": [ { \\"use\":
    \\"home\\\", \\"state\": \\"NY\\\", \\"country\": \\"US\\\", \\"source\": { \\"text\": \\"Office\\\", \\"coding\": [ { \\"system\":
    \\"http://wcm/source\\\", \\"code\": \\"ABC\\\" } ] }, \\"originalSource\": { \\"text\": \\"Mentioned by client\\\", \\"coding\":
    [ { \\"system\": \\"http://wcm/originalsource\\\", \\"code\": \\"DEF\\\" } ] }, \\"city\": \\"New York\\\", \\"line1\":
    \\"31\\\", \\"line2\": \\"Park Avenue\\\", \\"line3\": \"\", \\"postalCode\": \\"12345678\\\", \\"identifier\": [ { \\"value\":
    \\"123\\\", \\"type\": { \\"text\": \\"ExternalIdentifier\\\" } } ], \\"period\": { \\"start\": \\"2019-01-03\\\", \\"end\":
    \\"\\\" } } ], \\"maritalStatus\": { \\"coding\": [ { \\"system\": \\"http://hl7.org/fhir/v3/MaritalStatus\\\", \\"code\":
    \\"D\\\" } ], \\"period\": { \\"start\": \\"2019-01-03\\\", \\"end\": \\"\\\" } }, \\"telecom\": [ { \\"system\": \\"phone\\",
    \\"value\": \\"090909\\\", \\"use\": \\"home\\\", \\"source\": { \\"text\": \\"Office\\\", \\"coding\": [ { \\"system\":
    \\"http://wcm/source\\\", \\"code\": \\"ABC\\\" } ] }, \\"originalSource\": { \\"text\": \\"Mentioned by client\\\", \\"coding\":
    [ { \\"system\": \\"http://wcm/originalsource\\\", \\"code\": \\"DEF\\\" } ] }, \\"identifier\": [ { \\"value\": \\"456\\",
    \\"type\": { \\"text\": \\"ExternalIdentifier\\\" } } ], \\"period\": { \\"start\": \\"2019-01-03\\\", \\"end\": \\"\\\" } } ],
    \\"name\": [ { \\"use\": \\"official\\\", \\"family\": \\"Smith\\\", \\"given\": \\"Carl\\\", \\"prefix\": \"\",
    \\"suffix\": \"\", \\"middle\": \"\", \\"source\": { \\"text\": \\"Office\\\", \\"coding\": [ { \\"system\": \\"http://wcm/source\\",
    \\"code\": \\"ABC\\\" } ] }, \\"originalSource\": { \\"text\": \\"Mentioned by client\\\", \\"coding\": [ { \\"system\":
    \\"http://wcm/originalsource\\\", \\"code\": \\"DEF\\\" } ] }, \\"identifier\": [ { \\"value\": \\"789\\\", \\"type\":
    { \\"text\": \\"ExternalIdentifier\\\" } } ] }, \\"identifier\": [ { \\"value\": \\"12349876\\\", \\"source\": { \\"text\":
    \\"Office\\\", \\"coding\": [ { \\"system\": \\"http://wcm/source\\\", \\"code\": \\"ABC\\\" } ] }, \\"originalSource\":
```

```
{
  \"text\": \"Mentioned by client\", \"coding\": [ { \"system\": \"http://wcm/originalsource\", \"code\": \"DEF\" } ], \"type\": { \"coding\": [ { \"system\": \"http://wcm/identification\", \"code\": \"GHIL\" } ] }, \"period\": { \"start\": \"2019-01-03\", \"end\": \"\" } ], \"headerSources\": { \"birthDeathSource\": { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, \"genderSource\": { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, \"maritalStatusSource\": { \"text\": \"Office\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"ABC\" } ] }, \"birthDeathOriginalSource\": { \"text\": \"Mentioned by client\", \"coding\": [ { \"system\": \"http://wcm/originalsource\", \"code\": \"DEF\" } ] }, \"genderOriginalSource\": { \"text\": \"Mentioned by client\", \"coding\": [ { \"system\": \"http://wcm/originalsource\", \"code\": \"DEF\" } ] }, \"maritalStatusOriginalSource\": { \"text\": \"Mentioned by client\", \"coding\": [ { \"system\": \"http://wcm/originalsource\", \"code\": \"DEF\" } ] } }
}

asString();
```

## Parameters

### **Referer(header)**

**type** string

**array** curam://foundational.app

**required** true

### **X-WCM-TENANT-ID(header)**

**type** string

**array** The tenant ID.

**required** true

### **X-WCM-TENANT-INSTANCE(header)**

**type** string

**array** The tenant instance.

**required** true

### **Authorization(header)**

**type** string

**array** The Access Token.

**required** true

**X-GRANT-TYPE(header)**

**type** string  
**array** client\_credentials  
**required** true

**Request body**

The inbound message that contains the information required to create a client registration.

**Required:**true

**Media types**

**application/json**

**Schema** [PatientRegistration](#)  
(*on page 533*)

**Responses**

**201**

The post request was successful.

**Headers**

Name	Description	Schema
Location	The location of the new resource.	<b>type</b> string

**400**

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error messages:

EESERR610 - Expected resourceType is Patient.

EESERR605 - Can't register a dead patient.

EESERR606 - Max number of names to be provided is 5.

EESERR607 - Max number of addresses to be provided is 5.

EESERR608 - Max number of patient identifiers to be provided is 10.

EESERR609 - Max number of contact points to be provided is 5.

EESERR503 - Patient's status must be active.

EESERR485 - Patient's birth date must be provided.

EESERR486 - Patient's birth date must be before today's date.

EESERR488 - Deceased date can't be before date of birth.

EESERR489 - Deceased date can't be in the future.

EESERR490 - A gender value must be provided.

EESERR491 - Invalid code provided for 'gender'.

EESERR492 - Patient's status must be active.

EESERR493 - Only accepted system for marital status code is fhir Marital status.

EESERR494 - A marital status code must be provided when Marital status is provided.

EESERR495 - Invalid code provided for 'marital status'.

EESERR480 - A name must be provided.

EESERR481 - Period start date must be before today's date.

EESERR482 - Period end date must be after start date.

EESERR483 - Period start date must be provided if end is provided.

EESERR484 - Period start date must be after patient's birth date.

EESERR357 - Values for identifier text and identifier value must be provided if identifier is provided.

EESERR358 - Max number of identifiers to be provided per record is 3.

EESERR350 - Identifiers for a client's record of the same type must be unique.

EESERR353 - Identifier ... - ... matches multiple ... records for this person.

EESERR359 - Resource ... is locked by another process.

EESERR355 - Concurrent processing, please retry.

EESERR636 - Failed to retrieve case ID for the patient.

EESERR635 - Failed to create a record.

EESERR651 - Failed to create a record: ...

EESERR641 - Failed to map values provided to WCM address type.

EESERR518 - Only US addresses are supported.

EESERR519 - Address details must be provided if an address is provided.

EESERR600 - Invalid 'use' provided for address.

EESERR601 - Invalid 'state' provided for address.

EESERR628 - External system reference value provided for patient identifier code matches no record.

EESERR646 - Failed to map values provided to WCM identification type.

EESERR513 - An Identification External System Reference 'code' is mandatory for patient Identifier.

EESERR514 - Only 1 coding object can be provided for patient Identifier.

EESERR515 - Only wcm system is supported for patient Identifier codes.

EESERR516 - A 'value' must be provided if patient Identifier is provided.

EESERR517 - The 'value' for patient Identifier must not exceed 18 characters.

EESERR520 - A valid reference for a source system must be provided.

EESERR504 - A subject reference must be provided.

EESERR603 - The 'code' for patient Identifier must not exceed 20 characters.

EESERR639 - Failed to map values provided to WCM name type.

EESERR629 - External system reference value provided for name suffix matches no record.

EESERR630 - External system reference value provided for name prefix matches no record.

EESERR496 - Values must be provided for 'family', 'given' and 'use' name's attributes.

EESERR497 - An 'official' name must be provided.

EESERR498 - Only 1 'preferred' name can be provided.

EESERR499 - Only 1 'official' name can be provided.

EESERR500 - Invalid 'use' value provided for name.

EESERR640 - Failed to map values provided to WCM birth/death type.

EESERR634 - Invalid request.

EESERR644 - Failed to map values provided to WCM gender type.

EESERR645 - Failed to map values provided to WCM marital status type.

EESERR642 - Failed to map values provided to WCM email type.

EESERR509 - The 'use' provided for contact point 'email' is not supported.

EESERR505 - Invalid 'system' provided for contact point record.

EESERR506 - The 'system' provided for contact point is not supported.

EESERR507 - A 'value' must be provided if contact point is provided.

EESERR508 - A 'use' for contact point must be provided if contact point is provided.

EESERR602 - A 'system' must be specified if contact point is provided.

EESERR643 - Failed to map values provided to WCM phone type.

EESERR511 - The 'use' provided for contact point 'phone' is not supported.

EESERR512 - The 'value' for contact point 'phone' must not exceed 20 characters.

EESERR505 - Invalid 'system' provided for contact point record.

EESERR506 - The 'system' provided for contact point is not supported.

EESERR507 - A 'value' must be provided if contact point is provided.

EESERR602 - A 'system' must be specified if contact point is provided.

EESERR616 - A valid reference for a source system must be provided.

EESERR617 - A valid reference for an original source system must be provided.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 552](#))

**401**

Invalid authentication credentials for the target resource entered.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 552](#))

**500**

An internal server error occurred. Contact your administrator for more information.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 552](#))

**default**

An unexpected error occurred. Check the error message for more information.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 552](#))

## Components

## Schemas

### PatientRegistration

#### Properties

**resourceType** string

**description**  
Mandatory.

For Individual registration, the expected resource type is "Patient". Any other value is rejected.

**array** Patient

**active** boolean

**description**  
Mandatory.

The "active" boolean attribute stores the status of the individual. Only individuals with an Active status are accepted on registration in Watson Care Manager.

**default** true

**gender** string

**description**  
Mandatory.

The "gender" attribute is used to submit the individual's gender.

**enum**

- male
- female
- other
- unknown

**birthDate** string(*date*)

**description**  
Mandatory.

The "birthDate" represents the date of birth of the individual. Accepted format is yyyy-MM-dd.

**deceasedBoolean** boolean

**description**

Optional.

The "deceasedBoolean" boolean attribute communicates the deceased status of an individual. Watson Care Manager supports registration of live individuals only.

**default** false

**deceasedDate** string(*date*)

**description**

Optional.

The "deceasedDate" is the date of death of the individual.

Watson Care Manager supports registration of live individuals only. Accepted format is yyyy-MM-dd.

**default**

**source** \$ref [CodeableConceptSource](#)

(*on page 550*)

**originalSource** \$ref [CodeableConceptOriginalSource](#)

(*on page 551*)

**address** array

**maxItems** 5

**description**

Optional.

List of addresses for the individual. Up to 5 records can be provided.

**items** \$ref [Address](#)

(*on page 538*)

**maritalStatus** object

**description**

Marital (civil) status of an individual.

**\$ref**

CodeableConceptMS (*on page 548*)

**telecom**

array

**maxItems** 5**description**

Optional.

A contact detail for the individual. Up to 5 records can be provided.

**items**\$ref [ContactPoint](#)*(on page  
546)***name**

array

**maxItems** 5**description**

Mandatory.

Name records for the lidividual. Up to 5 records can be provided.  
One of the name record must be of 'official' use.

**items**\$ref [HumanName](#)*(on page  
543)***identifier**

array

**maxItems** 10**description**

Optional.

List pf identification records to be created when registering an individual.

Up to 10 identifications can be provided on registration.

**items**\$ref [PatientIdentifier](#)*(on page  
536)***headerSources**\$ref [HeaderSources](#)*(on page  
552)*

**type** object**required**

- active
- gender
- resourceType
- name
- birthDate
- source

**PatientIdentifier****Properties****value** string**description**

Optional.

The identification value corresponds to the identification number in Watson Care Manager. If an identification resource is provided, a value must be provided.

**maxLength** 18**source** \$ref [CodeableConceptSource](#)

(on page 550)

**originalSource** \$ref [CodeableConceptOriginalSource](#)

(on page 551)

**type** object\$ref [CodeableConceptPI](#)

(on page 537)

**period** object**description**

Optional.

A Period object stores the start and the end date of the enclosing record.

\$ref [Period](#) (on page 537)**type** object

## Period

### Properties

**start** string(*date*)

**description**

Optional.

The start date of the record.

The expected format is yyyy-MM-dd.

**end** string(*date*)

**description**

Optional.

The end date of the record.

If provided, the start date must also  
be provided.

The expected format is yyyy-MM-dd.

**type** object

## CodeableConceptPI

### Properties

**coding** array

**maxItems** 1

**description**

Optional.

The Coding object stores the details of the identification type to be created  
for an individual.

It must be provided if an identification value is provided.

1 Coding per Identification record can be provided.

**items**      \$ref [CodingPI](#)  
*(on page  
538)*

**type** object

## CodingPI

### Properties

**system** string

**description**  
Optional.

If provided, it must be "http://wcm/identification" .

**array**      http://wcm/identification

**code** string

**description**  
Optional.

This value stores the Identification External System reference that a Watson Care Manager Admin user configured for an Identification Type.

It must be provided if an identification value is provided.

**maxLength** 20

**type** object

## Address

### Properties

**use** string

**description**  
Optional.

The "use" value describes the purpose of the address record.

The values provided map to Watson Care Manager Address Type attribute, as follows: "home" > Residential "work" > Work "temp" > Temporary "old" > Old "mailing" > Mailing "other" > Other

If no value is provided, the Watson Care Manager default value of Residential will be applied.

**enum**

- home
- work
- temp
- old
- mailing
- other

**state** string**description**

Optional.

This attribute stores the value for the US State. If provided, it must match one of the values of the enumeration.

**enum**

- AL
- AK
- AZ
- AR
- AS
- CA
- CT
- CO
- DE
- DC
- FL
- GA
- GU
- HI
- ID
- IL
- IN

- IA
- KS
- KY
- LA
- ME
- MD
- MA
- MI
- MN
- MS
- MO
- MP
- MT
- NE
- NV
- NH
- NJ
- NM
- NY
- NC
- ND
- OH
- OK
- OR
- PA
- PR
- RI
- SC
- SD
- TN
- TX
- UT
- VI
- VT
- VA
- WA
- WV

- WI
- WY

**country** string

**description**  
Optional.

This attribute stores the value for country. If provided, it must be US.

**array** US

**source** \$ref [CodeableConceptSource](#)  
(*on page 550*)

**originalSource** \$ref [CodeableConceptOriginalSource](#)  
(*on page 551*)

**city** string

**description**  
Optional.

This attribute stores the value for city. This value is displayed in Watson Care Manager with the same name.

**maxLength** 100

**line1** string

**description**  
Optional.

This attribute stores the value for the first of 3 lines provided for address details.

**maxLength** 100

**line2** string

**description**  
Optional.

This attribute stores the value for the second of 3 lines provided for address details.

**maxLength** 100

**line3** string

**description**

Optional.

This attribute stores the value for the third of 3 lines provided for address details.

**maxLength** 100

**postalCode** string

**description**

Optional.

This attribute stores the value for the postal code.

**maxLength** 100

**identifier** array

**maxItems** 3

**description**

Optional.

The Identifier list of objects stores values of external identifiers for the enclosing record.

Identifier objects can be used to create and update records.

An external system can provide up to 3 identifiers for a record on registration.

For Example: An Address record that is created on registration, providing this identifier: identifier.type.text = "ExtSys1" identifier.value = "698368" can then be updated by invoking the Address PUT API and providing this identifier.

**items** \$ref [Identifier](#)

*(on page  
543)*

**period** object

**description**

Optional.

A Period object stores the start and the end date of the enclosing record.

**\$ref** [Period \(on page 537\)](#)

**type** object

## Identifier

### Properties

**value** string

**description**  
Optional.

This attribute stores the external identifier value. If provided, a type.text value must be provided.

**maxLength** 100

**type** object

**description**  
Optional. This object stores the value for the Identifier type.

**\$ref** [CodeableConcept \(on page 543\)](#)

**type** object

## CodeableConcept

### Properties

**text** string

**description**  
Optional.

This attribute stores the value for the Identification type. It must be provided if an identifier value is provided.

**maxLength** 100

**type** object

## HumanName

### Properties

**use** string

**description**

Mandatory.

The "use" value describes the purpose of the name record.

Available values to be used are listed below, on the left is the corresponding Watson Care Manager name Type value, as it is displayed in the Client Data page when viewing the Name record:

"usual" > Preferred "official" > Registered "temp" > Temporary  
"nickname" > Alias "anonymous" > Anonymous "old" > Old "maiden"  
> Maiden

An individual who is registered in Watson Care Manager must have 1 Registered name. A POST request for registering an individual fails if a name with 'official' use is not provided.

An individual who is registered in Watson Care Manager can have only 1 Preferred name. A POST request for registering an individual fails if > 1 name with 'usual' use is provided.

**enum**

- usual
- official
- temp
- nickname
- anonymous
- old
- maiden

**family** string

**description**

Mandatory.

The "family" attribute stores the value for the WCM "Last Name".

**maxLength** 65

**given** string

**description**

Mandatory.

The "given" attribute holds the value for the Watson Care Manager "First Name".

**maxLength** 65

**prefix** string

**description**

Optional.

The "prefix" attribute stores the Title External System Reference that a Watson Care Manager Admin user configured.

**maxLength** 20

**suffix** string

**description**

Optional.

The "suffix" attribute stores the Suffix External System Reference that a Watson Care Manager Admin user configured.

**maxLength** 20

**middle** string

**description**

Optional.

The "middle" attribute stores the value for the Watson Care Manager "Middle Name".

**maxLength** 65

**source** \$ref [CodeableConceptSource](#)  
*(on page 550)*

**originalSource** \$ref [CodeableConceptOriginalSource](#)  
*(on page 551)*

**identifier** array

**maxItems** 3

**description**

Optional.

The Identifier list of objects stores values of external identifiers for the enclosing record.

Identifier objects can be used to create and update records.

An external system can provide up to 3 identifiers for a record on registration.

For Example: A Name record that is created on registration, providing this identifier: identifier.type.text = "ExtSys1" identifier.value = "698368" can then be updated by invoking the Names PUT API and providing this identifier.

**items**      \$ref [Identifier](#)  
*(on page  
543)*

**type**      object

**required**

- family
- given
- use

## ContactPoint

### Properties

**system**      string

**description**  
Optional.

This attribute defines the communications system that is required to make use of the contact.

It must be provided if a telecom record is provided.

The "system" determines whether the record is a Watson Care Manager Email or Phone data type.

If 'phone' is provided, this corresponds to a Watson Care Manager Phone record. If 'email' is provided, this corresponds to a Watson Care Manager Email record.

<b>enum</b>	<ul style="list-style-type: none"> <li>• phone</li> <li>• email</li> </ul>
<b>value</b>	string
<b>description</b>	<p>Optional. It must be provided if a telecom record is provided. This attribute holds the actual contact point details. If the "system" is 'phone', the value must not exceed 20 characters.</p>
<b>maxLength</b>	256
<b>use</b>	string
<b>description</b>	<p>Optional.</p> <p>The "use" attribute describes the purpose of the telecom record.</p> <p>If the "system" is 'phone', the use value is mapped to a Phone Type, as follows: "home" &gt; Home "work" &gt; Work "temp" &gt; Temporary "mobile" &gt; Mobile "old" &gt; Old</p> <p>If no value is provided, the Watson Care Manager default value of Home is applied to the Phone Type.</p> <p>If the "system" is 'email', the use value is mapped to an Email Type, as follows: "home" &gt; Personal "work" &gt; Work "temp" &gt; Temporary "old" &gt; Old</p> <p>If no value is provided, the Watson Care Manager default value of Personal is applied to the Email type. A mobile "use" for an email is rejected.</p>
<b>enum</b>	<ul style="list-style-type: none"> <li>• home</li> <li>• work</li> <li>• temp</li> <li>• mobile</li> <li>• old</li> </ul>

**source**      \$ref [CodeableConceptSource](#)

([on page 550](#))

**originalSource** \$ref [CodeableConceptOriginalSource](#)

([on page 551](#))

**identifier**      array

**maxItems** 3

**description**  
Optional.

The Identifier list of objects stores values of external identifiers for the enclosing record.

Identifier objects can be used to create and update records.

An external system can provide up to 3 identifiers for a record on registration.

For Example: An Email record that is created on registration, providing this identifier: identifier.type.text = "ExtSys1" identifier.value = "698368" can then be updated by invoking the Telecoms PUT API and providing this identifier.

**items**      \$ref [Identifier](#)

([on page  
543](#))

**period**      object

**description**  
Optional.

A Period object stores the start and the end date of the enclosing record.

\$ref      [Period \(\[on page 537\]\(#\)\)](#)

**type** object

## CodeableConceptMS

### Properties

**coding** array

**maxItems** 1**items** \$ref [CodingMS](#)*(on page  
549)***period** object**description**

Optional.

A Period object stores the start and the end date of the enclosing record.

**\$ref** [Period \(on page 537\)](#)**type** object

## CodingMS

### Properties

**system** string**description**

Optional.

If provided, it must be "http://hl7.org/fhir/v3/MaritalStatus".

**array**

http://hl7.org/fhir/v3/MaritalStatus

**code** string**description**

Optional. The "code" value describes the civil marital status of the individual. The value provided maps to Watson Care Manager Marital Status attribute, as follows: "L" > Legally Separated "M" > Married "T" > Life Partner "S" > Single "U" > Single "W" > Widowed "UNK" > Not Disclosed / Unknown "A" > Annulled "I" > Interlocutory "P" > Polygamous

**enum**

- D
- L
- M
- T
- S
- U
- W
- UNK
- A
- I
- P

**type** object

## CodeableConceptSource

### Properties

**text** string

**description**  
Optional

Textual description of codeable concept.

**coding** array

**maxItems** 1

**items** \$ref CodingSource

(*on page*  
550)

**type** object

## CodingSource

### Properties

**system** string

**description**  
Required.

"http://wcm/source" for source.

**array** http://wcm/source  
**code** string

**description**  
 Required. The "code" value describes the source system.  
 The value provided maps to Watson Care Manager Source System

**maxLength** 20

**type** object

**array** code

## CodeableConceptOriginalSource

### Properties

**text** string

**description**  
 Optional

Textual description of codeable concept.

**coding** array

**maxItems** 1  
**items** \$ref CodingOriginalSource  
*(on page 551)*

**type** object

## CodingOriginalSource

### Properties

**system** string

**description**  
 Required.

"http://wcm/originalsource" for orginal source.

**array** http://wcm/originalsource  
**code** string

**description**

Required. The "code" value describes the original source system. The value provided maps to Watson Care Manager Original Source System

**maxLength** 20

**type** object

**array** code

## HeaderSources

### Properties

<b>birthDeathSource</b>	\$ref <a href="#">CodeableConceptSource</a> <i>(on page 550)</i>
<b>genderSource</b>	\$ref <a href="#">CodeableConceptSource</a> <i>(on page 550)</i>
<b>maritalStatusSource</b>	\$ref <a href="#">CodeableConceptSource</a> <i>(on page 550)</i>
<b>birthDeathOriginalSource</b>	\$ref <a href="#">CodeableConceptOriginalSource</a> <i>(on page 551)</i>
<b>genderOriginalSource</b>	\$ref <a href="#">CodeableConceptOriginalSource</a> <i>(on page 551)</i>
<b>maritalStatusOriginalSource</b>	\$ref <a href="#">CodeableConceptOriginalSource</a> <i>(on page 551)</i>

**type** object

## DefaultErrorModel

### Properties

**Error** array

**items** \$ref [Error \(on page 553\)](#)

**type** object

## Error

### Properties

**code** integer(*int32*)

**description**

A machine-readable code that identifies the problem. This does vary with the Accept-Language setting.

**message** string

**description**

A human-readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text may change over time.

**level** string

**description**

The level of the error.

**type** object

**required**

- code
- message
- level

## (Demographics) Address API

Version:v1

By using the protected APIs that follow, you can send address updates for a client from an external system to Watson Care Manager so that Watson Care Manager accurately reflects the external system data. The API sends Watson Care Manager updates for a client's residential, work, or mailing address. The client is identified when Watson Care Manager receives the WCM client ID or the external ID and type

(with or without the client's date of birth). The client's address record is identified when Watson Care Manager receives an identifier type and record id for each address type.

## Servers

<https://host/Rest>

### API methods: Create an address

#### POST /v1/ees/individual\_addresses

Create an address record for a client who is registered in Watson Care Manager.

Creates a client address record based on an event in the external system that initiates a transfer of valid data to Watson Care Manager.

#### Example request

##### CURL

```
curl -X POST "https://host:port/Rest/v1/ees/individual_addresses" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Content-Type: application/json" -d "{ \"use\": \"home\", \"state\": \"NM\", \"country\": \"US\", \"resourceType\": \"Address\", \"source\": \"Dep. of Justice\", \"originalSource\": \"Officer\", \"city\": \"Santa Fe\", \"line1\": \"Apt. 9\", \"line2\": \"Park Avenue\", \"line3\": \"Cherrywood\", \"postalCode\": \"68954632\", \"identifier\": [ { \"value\": \"67974\", \"type\": { \"text\": \"System 6\" } }, { \"period\": { \"start\": \"2018-06-06\", \"end\": \"\" }, \"subject\": { \"reference\": \"patient/identifiercode=ext, identifiervalue=12345\" } } ] }
```

##### JAVA

```
HttpResponse response = Unirest.post("https://host:port/Rest/v1/ees/individual_addresses")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
```

```

.header("Content-Type", "application/json")

.body("{  \"use\": \"home\",  \"state\": \"NM\",  \"country\": \"US\",  \"resourceType\": \"Address\",
\"source\": \"Dep. of Justice\",  \"originalSource\": \"Officer\",  \"city\": \"Santa Fe\",  \"line1\": \"Apt.
9\",  \"line2\": \"Park Avenue\",  \"line3\": \"Cherrywood\",  \"postalCode\": \"68954632\",  \"identifier\": [
{
  \"value\": \"67974\",
  \"type\": {
    \"text\": \"System 6\"
  }
},
  \"period\": {
    \"start\": \"2018-06-06\",
    \"end\": \"\"
  },
  \"subject\": {
    \"reference\": \"patient/identifiercode=ext,
identifiervalue=12345\"
  }
})
.asString();

```

## Parameters

### **Referer(header)**

**type** string

**array** curam://foundational.app

**required** true

### **X-WCM-TENANT-ID(header)**

**type** string

**array** The tenant ID.

**required** true

### **X-WCM-TENANT-INSTANCE(header)**

**type** string

**array** The tenant instance.

**required** true

### **Authorization(header)**

**type** string

**array** The Access Token.

**required** true

### **X-GRANT-TYPE(header)**

**type** string

**array** client\_credentials

**required** true

## Request body

The inbound message that contains the information required to create a client address record.

**Required:**true

### Media types

**application/json**

**Schema** [NewAddressCr](#)

(*on page*  
581)

## Responses

### 201

The post request was successful.

#### Headers

Name	Description	Schema
Location	The location of the new resource.	<b>type</b> string

### 400

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible errors message: EESERR161 - There are no matching individuals based on the ID entered. EESERR165 - The individual ID value provided, ..., is invalid and not in the correct format. EESERR180 - The identification details provided match multiple clients. EESERR182 - The date value provided, ..., is invalid and not in the correct format. EESERR183 - The date value provided, ..., is invalid. EESERR193 - A valid reference number or 'identifier' and 'identifierValue' or 'identifiercode' and 'identifierValue' must be provided. EESERR641 - Failed to map values provided to WCM address type. EESERR611 - Expected resourceType is Address. EESERR518 - Only US addresses are supported. EESERR519 - Address details must be provided if an address is provided. EESERR600 - Invalid 'use' provided for address. EESERR601 - Invalid 'state' provided

for address. EESERR504 - A subject reference must be provided. EESERR635 - Failed to create a record. EESERR651 - Failed to create a record: ... EESERR357 - Values for identifier text and identifier value must be provided if identifier is provided. EESERR358 - Max number of identifiers to be provided per record is 3. EESERR350 - Identifiers for a client's record of the same type must be unique. EESERR353 - Identifier ... - ... matches multiple Address records for this person. EESERR354 - Resource id and identifier(s) match different Address records for this person. EESERR352 - Address record with identifier ... - ... already exists for this person. EESERR359 - Resource ... is locked by another process. EESERR355 - Concurrent processing, please retry. EESERR636 - Failed to retrieve case ID for the patient. EESERR649 - Error: .... EESERR650 - Error: .... EESERR481 - Period start date must be before today's date. EESERR482 - Period end date must be after start date. EESERR483 - Period start date must be provide if end is provided. EESERR484 - Period start date must be after patient's birth date.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 591)*

#### 401

Invalid authentication credentials for the target resource entered.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 591)*

#### 500

An internal server error occurred. Contact your administrator for more information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 591)*

#### default

An unexpected error occurred. Check the error message for more information.

**Media types****application/json****Schema DefaultErrorModel***(on page 591)***API methods: Update an address****PUT /v1/ees/individual\_addresses**

Update an address record for a client who is registered in Watson Care Manager.

Updates a client's address assuming that a matching record is found when the external system initiates a transfer of valid data to Watson Care Manager. Watson Care Manager identifies the record to be updated based on the external identifiers that the external system provides in the body. If no matching address record is found, Watson Care Manager creates a new address record for the individual.

**Example request**

cURL

```
curl -X PUT "https://host:port/Rest/v1/ees/individual_addresses" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Content-Type: application/json" -d "{ \"use\": \"home\", \"state\": \"NM\", \"country\": \"US\", \"resourceType\": \"Address\", \"source\": \"Dep. of Justice\", \"originalSource\": \"Officer\", \"city\": \"Santa Fe\", \"line1\": \"Apt. 9\", \"line2\": \"Park Avenue\", \"line3\": \"Cherrywood\", \"postalCode\": \"68954632\", \"identifier\": [ { \"value\": \"67974\", \"type\": { \"text\": \"System 6\" } }, { \"period\": { \"start\": \"2018-06-06\", \"end\": \"\" }, \"subject\": { \"reference\": \"patient/identifiercode=ext, identifiervalue=12345\" } } ] }
```

JAVA

```
HttpResponse response = Unirest.put("https://host:port/Rest/v1/ees/individual_addresses")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("Referer", "curam://foundational.app")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
```

```
.header("X-WCM-TENANT-ID", "Tenant ID")

.header("Content-Type", "application/json")

.body("{ \"use\": \"home\", \"state\": \"NM\", \"country\": \"US\", \"resourceType\": \"Address\", \"source\": \"Dep. of Justice\", \"originalSource\": \"Officer\", \"city\": \"Santa Fe\", \"line1\": \"Apt. 9\", \"line2\": \"Park Avenue\", \"line3\": \"Cherrywood\", \"postalCode\": \"68954632\", \"identifier\": [ { \"value\": \"67974\", \"type\": { \"text\": \"System 6\" } }, { \"period\": { \"start\": \"2018-06-06\", \"end\": \"\" }, \"subject\": { \"reference\": \"patient/identifiercode=ext, identifiervalue=12345\" } } ] }")
.asString();
```

## Parameters

### **Referer(header)**

**type** string

**array** curam://foundational.app

**required** true

### **X-WCM-TENANT-ID(header)**

**type** string

**array** The tenant ID.

**required** true

### **X-WCM-TENANT-INSTANCE(header)**

**type** string

**array** The tenant instance.

**required** true

### **Authorization(header)**

**type** string

**array** The Access Token.

**required** true

### **X-GRANT-TYPE(header)**

**type** string

**array** client\_credentials

**required** true

## Request body

The inbound message that contains the information required to update a client address record.

**Required:**true

### Media types

**application/json**

**Schema** [ModifiedAddressCr](#)

(*on page 576*)

## Responses

### 200

The put request was successful.

### Media types

**application/json**

**Schema** [ModifiedAddressExt](#)

(*on page 586*)

### 400

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error messages: EESERR161 - There are no matching individuals based on the ID entered. EESERR165 - The individual ID value provided, ..., is invalid and not in the correct format. EESERR180 - The identification details provided match multiple clients. EESERR182 - The date value provided, ..., is invalid and not in the correct format. EESERR183 - The date value provided, ..., is invalid. EESERR193 - A valid reference number or 'identifier' and 'identifierValue' or 'identifiercode' and 'identifierValue' must be provided. EESERR631 - Address 'use' can't be updated with a value different from the existing one. EESERR641 - Failed to map values provided to WCM address type. EESERR611 - Expected resourceType is Address. EESERR518 - Only US addresses are supported. EESERR519 - Address details must be provided if an address is provided. EESERR600 - Invalid 'use' provided for address. EESERR601 - Invalid 'state' provided

for address. EESERR504 - A subject reference must be provided. EESERR357 - Values for identifier text and identifier value must be provided if identifier is provided. EESERR358 - Max number of identifiers to be provided per record is 3. EESERR350 - Identifiers for a client's record of the same type must be unique. EESERR353 - Identifier ... - ... matches multiple Address records for this person. EESERR354 - Resource id and identifier(s) match different Address records for this person. EESERR623 - The record was updated by a Care Manager, so it can't be updated by an external system. EESERR637 - Failed to update a record. EESERR652 - Failed to update a record: ... EESERR351 - The resource id provided doesn't exist for a Address record for this person. EESERR625 - The record was deleted by a Care Manager, so it can't be reactivated by an external system. EESERR648 - Error reading the existing record . EESERR359 - Resource ... is locked by another process. EESERR355 - Concurrent processing, please retry. EESERR636 - Failed to retrieve case ID for the patient. EESERR647 - Error reading the existing record . EESERR649 - Error: ... . EESERR650 - Error: ... . EESERR626 - The record doesn't exist. EESERR356 - Resource ... doesn't exist. EESERR481 - Period start date must be before today's date. EESERR482 - Period end date must be after start date. EESERR483 - Period start date must be provide if end is provided. EESERR484 - Period start date must be after patient's birth date.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 591)*

#### 401

Invalid authentication credentials for the target resource entered.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 591)*

#### 500

An internal server error occurred. Contact your administrator for more information.

#### Media types

**application/json**

**Schema** DefaultErrorModel*(on page 591)***default**

An unexpected error occurred. Check the error message for more information.

**Media types****application/json****Schema** DefaultErrorModel*(on page 591)***API methods: Update an address (by ID)**

**PUT /v1/ees/individual\_addresses/{id}**

Update an address record for a client who is registered in Watson Care Manager.

Updates a client's address assuming that a matching record is found when the external system initiates a transfer of valid data to Watson Care Manager. Watson Care Manager identifies the record to be updated based on the resource ID that the external system provides in the path and body.

**Example request**

cURL

```
curl -X PUT "https://host:port/Rest/v1/ees/individual_addresses/912" -H "accept: application/json" -H
"X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Referer: curam://foundational.app"
-H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Content-Type: application/json" -d
"{
  \"id\": \"912\",
  \"use\": \"home\",
  \"state\": \"NM\",
  \"country\": \"US\",
  \"resourceType\": \"Address\",
  \"source\": \"Dep. of Justice\",
  \"originalSource\": \"Officer\",
  \"city\": \"Santa Fe\",
  \"line1\": \"Apt. 9\",
  \"line2\": \"Park Avenue\",
  \"line3\": \"Cherrywood\",
  \"postalCode\": \"68954632\",
  \"identifier\": [
    {
      \"value\": \"67974\",
      \"type\": {
        \"text\": \"System 6\"
      }
    }
  ],
  \"period\": {
    \"start\": \"2018-06-06\",
    \"end\": \"\",
    \"subject\": {
      \"reference\": \"patient/identifiercode=ext,
      identifiervalue=12345\" }
    }
  }
}
```

JAVA

```

HttpResponse response = Unirest.put("https://host/Rest/v1/ees/individual_addresses/912")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
    .header("Content-Type", "application/json")
    .body("{ \"id\": \"912\", \"use\": \"home\", \"state\": \"NM\", \"country\": \"US\", \"resourceType\": \"Address\", \"source\": \"Dep. of Justice\", \"originalSource\": \"Officer\", \"city\": \"Santa Fe\", \"line1\": \"Apt. 9\", \"line2\": \"Park Avenue\", \"line3\": \"Cherrywood\", \"postalCode\": \"68954632\", \"identifier\": [ { \"value\": \"67974\", \"type\": { \"text\": \"System 6\" } }, { \"start\": \"2018-06-06\", \"end\": \"\", \"subject\": { \"reference\": \"patient/identifiercode=ext, identifiervalue=12345\" } } ] }")
    .asString();

```

## Parameters

### **Referer**(*header*)

**type** string

**array** curam://foundational.app

**required** true

### **X-WCM-TENANT-ID**(*header*)

**type** string

**array** The tenant ID.

**required** true

### **X-WCM-TENANT-INSTANCE**(*header*)

**type** string

**array** The tenant instance.

**required** true

### **Authorization**(*header*)

**type** string

**array** The Access Token.

**required** true

**X-GRANT-TYPE**(*header*)

**type** string

**array** client\_credentials

**required** true

**id**(*path*)

Mandatory. The "id" attribute stores the resource ID of the Address resource ID to be updated.

**type** string

**maxLength** 900

**required** true

## Request body

The inbound message that contains the information required to update a client address record.

**Required:**true

**Media types**

application/json

**Schema** [ModifiedAddressExt](#)

(*on page 586*)

## Responses

**200**

The put request was successful.

**Media types**

application/json

**Schema** [ModifiedAddressExt](#)

(*on page 586*)

## 400

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error messages: EESERR161 - There are no matching individuals based on the ID entered. EESERR165 - The individual ID value provided, ..., is invalid and not in the correct format. EESERR180 - The identification details provided match multiple clients. EESERR182 - The date value provided, ..., is invalid and not in the correct format. EESERR183 - The date value provided, ..., is invalid. EESERR193 - A valid reference number or 'identifier' and 'identifierValue' or 'identifiercode' and 'identifierValue' must be provided. EESERR631 - Address 'use' can't be updated with a value different from the existing one. EESERR641 - Failed to map values provided to WCM address type. EESERR611 - Expected resourceType is Address. EESERR518 - Only US addresses are supported. EESERR519 - Address details must be provided if an address is provided. EESERR600 - Invalid 'use' provided for address. EESERR601 - Invalid 'state' provided for address. EESERR504 - A subject reference must be provided. EESERR357 - Values for identifier text and identifier value must be provided if identifier is provided. EESERR358 - Max number of identifiers to be provided per record is 3. EESERR350 - Identifiers for a client's record of the same type must be unique. EESERR353 - Identifier ... - ... matches multiple Address records for this person. EESERR354 - Resource id and identifier(s) match different Address records for this person. EESERR623 - The record was updated by a Care Manager, so it can't be updated by an external system. EESERR637 - Failed to update a record. EESERR652 - Failed to update a record: ... EESERR351 - The resource id provided doesn't exist for a Address record for this person. EESERR625 - The record was deleted by a Care Manager, so it can't be reactivated by an external system. EESERR648 - Error reading the existing record . EESERR359 - Resource ... is locked by another process. EESERR355 - Concurrent processing, please retry. EESERR636 - Failed to retrieve case ID for the patient. EESERR647 - Error reading the existing record . EESERR649 - Error: .... EESERR650 - Error: .... EESERR626 - The record doesn't exist. EESERR356 - Resource ... doesn't exist. EESERR481 - Period start date must be before today's date. EESERR482 - Period end date must be after start date. EESERR483 - Period start date must be provide if end is provided. EESERR484 - Period start date must be after patient's birth date.

### Media types

**application/json**

**Schema DefaultModelError**

(*on page 591*)

## 401

Invalid authentication credentials for the target resource entered.

### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 591)*

## 500

An internal server error occurred. Contact your administrator for more information.

### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 591)*

## default

An unexpected error occurred. Check the error message for more information.

### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 591)*

## API methods: Delete an address

**DELETE /v1/ees/individual\_addresses/{id}**

Delete an address record for a client who is registered in Watson Care Manager.

Deletes a client's address based on a delete event in the external system that initiates a transfer of information to Watson Care Manager. WCM identifies the record to be deleted based on the resource ID that the external system provides.

### Example request

## CURL

```
curl -X DELETE "https://host:port/Rest/v1/ees/individual_addresses/123" -H "accept: application/json" -H
"X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Referer: curam://foundational.app"
```

## JAVA

```
HttpResponse response = Unirest.delete("https://host:port/Rest/v1/ees/individual_addresses/123")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
    .asString();
```

**Parameters****Referer(*header*)****type** string**array** curam://foundational.app**required** true**X-WCM-TENANT-ID(*header*)****type** string**array** The tenant ID.**required** true**X-WCM-TENANT-INSTANCE(*header*)****type** string**array** The tenant instance.**required** true**Authorization(*header*)**

**type** string

**array** The Access Token.

**required** true

**X-GRANT-TYPE**(*header*)

**type** string

**array** client\_credentials

**required** true

**id**(*path*)

Mandatory. The "id" attribute stores the resource ID of the ContactPoint record to be deleted.

**type** string

**maxLength** 64

**required** true

## Responses

**204**

The delete request was successful.

**400**

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error messages returned: EESERR627 - The address record can't be deleted if only 1 exists. EESERR624 - The record was updated by a Care Manager, so it can't be deleted by an external system. EESERR638 - Failed to delete a record. EESERR653 - Failed to delete a record: ... . EESERR359 - Resource ... is locked by another process. EESERR355 - Concurrent processing, please retry. EESERR636 - Failed to retrieve case ID for the patient. EESERR647 - Error reading the existing record . EESERR649 - Error: ... . EESERR650 - Error: ... . EESERR626 - The record doesn't exist. EESERR356 - Resource ... doesn't exist.

### Media types

**application/json**

**Schema** [DefaultModelError](#)  
*(on page 591)*

## 401

Invalid authentication credentials for the target resource entered.

**Media types**

**application/json**

**Schema** [DefaultModelError](#)  
*(on page 591)*

## 500

An internal server error occurred. Contact your administrator for more information.

**Media types**

**application/json**

**Schema** [DefaultModelError](#)  
*(on page 591)*

## default

An unexpected error occurred. Check the error message for more information.

**Media types**

**application/json**

**Schema** [DefaultModelError](#)  
*(on page 591)*

## Components

### Schemas

#### NewPeriod

**Properties**

**start** string(*date*)

**description**

Optional. The start date of the record. The expected format is yyyy-MM-dd.

**end** string(*date*)

**description**

Optional.

The end date of the record. If provided, also the Start date must be provided. The expected format is yyyy-MM-dd.

**type** object

## ModifiedPeriod

### Properties

**start** string(*date*)

**description**

Optional. The start date of the record. The expected format is yyyy-MM-dd.

**end** string(*date*)

**description**

Optional.

The end date of the record. If provided, also the Start date must be provided. The expected format is yyyy-MM-dd.

**type** object

## NewIdentifier

### Properties

**value** string

**description**

Optional.

This attribute stores the external identifier value. If provided, a type.text value must be provided.

**maxLength** 100

**type** \$ref[NewCodeableConcept](#)

(on page 571)

**type** object

## NewCodeableConcept

### Properties

**text** string

**description**

Optional.

This attribute stores the value for the identifier type. It must be provided if an identifier value is provided.

**maxLength** 100

**type** object

## CodeableConceptSource

### Properties

**text** string

**description**

Optional

Textual description of codeable concept.

**coding** array

**maxItems** 1

**items** \$ref[CodingSource](#)

(on page

571)

**type** object

## CodingSource

### Properties

**system** string

**description**  
Required.

"http://wcm/source" for source.

**array** http://wcm/source

**code** string

**description**  
Required. The "code" value  
describes the source system.  
The value provided maps to  
Watson Care Manager Source  
System

**maxLength** 20

**type** object

**array** code

## CodeableConceptOriginalSource

### Properties

**text** string

**description**  
Optional

Textual description of codeable concept.

**coding** array

**maxItems** 1

**items** \$ref CodingOriginalSource

(on page 572)

**type** object

## CodingOriginalSource

### Properties

**system** string

**description**  
Required.

"http://wcm/originalsource" for orginal source.

**array** http://wcm/originalsource

**code** string

**description**  
Required. The "code" value describes the original source system. The value provided maps to Watson Care Manager Original Source System

**maxLength** 20

**type** object

**array** code

## ModifiedSubject

### Properties

**reference** string

**description**  
The Subject object is used to identify an individual in Watson Care Manager. The "reference" String is expected to contain identifier details that will be used to match an individual in Watson Care Manager. The string is parsed to extract query parameters and associated values. It can contain a combination of (1) WCM Patient ID (i.e. WCM Reference Number), (2) WCM Identification External System Reference and Identification number, (3) WCM Identification Type and Identification number, (4) WCM Identification External System Reference and Identification number and birthDate, (5) WCM Identification Type and Identification number and birthDate.

For example:

(1) WCM Patient ID

```
"subject": {
    "reference" : "patient/123      " }
```

(2) WCM Identification External System Reference and Identification number

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239"}
```

(3) WCM Identification External System Reference and Identification number,

```
"subject":{  
    "reference" : "patient/identifier=Passport, identifiervalue=239" }
```

(4) WCM Identification External System Reference and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239,  
    birthDate=19380821" }
```

(5) WCM Identification Type and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=Passport, identifiervalue=239,  
    birthDate=19380821" }
```

**maxLength** 150

**type** object

**array** reference

## NewSubject

### Properties

**reference** string

#### **description**

The Subject object is used to identify an individual in Watson Care Manager. The "reference" String is expected to contain identifier details that will be used to match an individual in Watson Care Manager.

The string is parsed to extract query parameters and associated values. It can contain a combination of

(1) WCM Patient ID (i.e. WCM Reference Number), (2) WCM Identification External System Reference and Identification number, (3) WCM Identification Type and Identification number, (4) WCM Identification External System Reference and Identification number and birthDate, (5) WCM Identification Type and Identification number and birthDate.

For example:

(1) WCM Patient ID

```
"subject":{  
    "reference" : "patient/123      " }
```

(2) WCM Identification External System Reference and Identification number

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239" }
```

(3) WCM Identification External System Reference and Identification number,

```
"subject":{  
    "reference" : "patient/identifier=Passport, identifiervalue=239" }
```

(4) WCM Identification External System Reference and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239,  
    birthDate=19380821" }
```

(5) WCM Identification Type and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=Passport, identifiervalue=239,  
    birthDate=19380821" }
```

**maxLength 150**

**type** object

**array** reference

## ModifiedIdentifier

### Properties

**value** string

**description**

Optional.

This attribute stores the external identifier value. If provided, a type.text value must be provided.

**maxLength** 100

**type** object

**description**

Optional.

This object stores the value for the Identifier type.

**\$ref** [ModifiedCodeableConcept \(on page 576\)](#)

**type** object

## ModifiedCodeableConcept

### Properties

**text** string

**description**

Optional.

This attribute stores the value for the Identification type. It must be provided if an identifier value is provided.

**maxLength** 100

**type** object

## ModifiedAddressCr

### Properties

**resourceType** string

**description**

Mandatory.

For Addresses APIs, the expected resource type is "Address".

<b>array</b>	Address
<b>use</b>	string

<b>description</b>	Optional.
--------------------	-----------

The "use" value describes the purpose of the address record.

The values provided map to WCM Address Type attribute, as follows: "home" > Residential "work" > Work "temp" > Temporary "old" > Old "mailing" > Mailing "other" > Other

If no value is provided for 'use' in the PUT request, the 'use' value of the existing record will be applied.

In Watson Care Manager, the Address Type value can't be updated. If in the PUT request a 'use' value provided different from the one of the existing record is provided, the update request will be rejected.

<b>enum</b>	<ul style="list-style-type: none"> <li>• home</li> <li>• work</li> <li>• temp</li> <li>• old</li> <li>• mailing</li> <li>• other</li> </ul>
-------------	---------------------------------------------------------------------------------------------------------------------------------------------

<b>state</b>	string
--------------	--------

<b>description</b>	Optional.
--------------------	-----------

This attribute stores the value for the US State. If provided, it must match one of the values of the enumeration.

<b>enum</b>	<ul style="list-style-type: none"> <li>• AL</li> <li>• AK</li> <li>• AZ</li> <li>• AR</li> </ul>
-------------	--------------------------------------------------------------------------------------------------

- CA
- CO
- CT
- DE
- DC
- FL
- GA
- HI
- ID
- IL
- IN
- IA
- KS
- KY
- LA
- ME
- MD
- MA
- MI
- MN
- MS
- MO
- MT
- NE
- NV
- NH
- NJ
- NM
- NY
- NC
- ND
- OH
- OK
- OR
- PA
- PR
- RI

- SC
- SD
- TN
- TX
- UT
- VT
- VA
- WA
- WV
- WI
- WY

**country** string

**description**  
Optional.

This attribute stores the value for country. If provided, it must be valid for the USA.

**array** US

**source** \$ref [CodeableConceptSource](#)  
(*on page 571*)

**originalSource** \$ref [CodeableConceptOriginalSource](#)  
(*on page 572*)

**city** string

**description**  
Optional.

This attribute stores the value for city. It is displayed in Watson Care Manager with the same name.

**maxLength** 100

**line1** string

**description**  
Optional.

This attribute stores the value for the first out of the 3 lines provided for address details.

	<b>maxLength</b> 100
<b>line2</b>	string
	<b>description</b>
	Optional.
	This attribute stores the value for the second line of 3 lines provided for address details.
	<b>maxLength</b> 100
<b>line3</b>	string
	<b>description</b>
	Optional.
	This attribute stores the value for the third line of 3 lines provided for address details.
	<b>maxLength</b> 100
<b>postalCode</b>	string
	<b>description</b>
	Optional.
	This attribute stores the value for the postal code.
	<b>maxLength</b> 100
<b>identifier</b>	array
	<b>maxItems</b> 3
	<b>description</b>
	Optional.
	The Identifier list of objects stores values of external identifiers for the enclosing record.
	Identifier objects can be used to create and update records.
	An external system can create record identifiers when creating or updating a record. An external system can provide up to 3 identifiers for a record, for each REST call.
	An individual's record can be identified using external identifiers.

When invoking this PUT API, if identifiers provided match an address record for this individual, the record is updated. If no address record is matched, a new address record is created. For Example: An Address record that was created providing this identifier: identifier.type.text = "ExtSys1" identifier.value = "698368" can then be updated invoking this API and providing the same identifier.

**items** [\\$ref ModifiedIdentifier](#)

(*on page 576*)

**period** object

**description**

Optional. A Period object stores the start and the end date of the enclosing record.

**\$ref** [ModifiedPeriod \(\*on page 570\*\)](#)

**subject** object

**description**

A Subject object stores the reference to the Patient the record belongs to.

**\$ref** [ModifiedSubject \(\*on page 573\*\)](#)

**type** object

**required**

- resourceType
- subject

## NewAddressCr

### Properties

**resourceType** string

**description**

Mandatory.

For Addresses APIs, the expected resource type is "Address".

**array** Address

**use** string

**description**

Optional.

The "use" value describes the purpose of the address record.

The values provided map to WCM Address Type attribute, as follows: "home" > Residential "work" > Work "temp" > Temporary "old" > Old "mailing" > Mailing "other" > Other

If no value is provided, the Watson Care Manager default value of Residential is applied.

**enum**

- home
- work
- temp
- old
- mailing
- other

**state** string

**description**

Optional.

This attribute stores the value for the US State. If provided, it must match one of the values of the enumeration.

**enum**

- AL
- AK
- AZ
- AR
- CA
- CO
- CT
- DE
- DC
- FL
- GA
- HI
- ID

- IL
- IN
- IA
- KS
- KY
- LA
- ME
- MD
- MA
- MI
- MN
- MS
- MO
- MT
- NE
- NV
- NH
- NJ
- NM
- NY
- NC
- ND
- OH
- OK
- OR
- PA
- PR
- RI
- SC
- SD
- TN
- TX
- UT
- VT
- VA
- WA
- WV

- WI
- WY

**country** string

**description**  
Optional.

This attribute stores the value for country. If provided, it must be US.

**array** US

**source** \$ref [CodeableConceptSource](#)  
*(on page 571)*

**originalSource** \$ref [CodeableConceptOriginalSource](#)  
*(on page 572)*

**city** string

**description**  
Optional.

This attribute stores the value for city. It gets displayed in Watson Care Manager with the same name.

**maxLength** 100

**line1** string

**description**  
Optional.

This attribute stores the value for the first of 3 lines provided for address details.

**maxLength** 100

**line2** string

**description**  
Optional.

This attribute stores the value for the second of 3 lines provided for address details.

**maxLength** 100

**line3** string

**description**

Optional.

This attribute stores the value for the third of 3 lines provided for address details.

**maxLength 100**

**postalCode** string

**description**

Optional.

This attribute stores the value for the postal code.

**maxLength 100**

**identifier** array

**maxItems 3****description**

Optional.

The Identifier list of objects stores values of external identifiers for the enclosing record.

Identifier objects can be used to create and update records.

An external system can create record identifiers when creating or updating a record. An external system can provide up to 3 identifiers for a record, for each REST call.

An individual's record can be identified using external identifiers.

When invoking this PUT API, if identifiers provided match an address record for this individual, the record is updated. If no address record is matched, a new address record is created. For Example: An Address record that was created providing this identifier: identifier.type.text = "ExtSys1" identifier.value = "698368" can be updated by invoking this API and providing the same identifier.

<b>items</b>	\$ref <a href="#">NewIdentifier</a> (on page 570)
<b>period</b>	object
<b>description</b>	Optional.
	A Period object stores the start and the end date of the enclosing record.
<b>\$ref</b>	<a href="#">NewPeriod (on page 569)</a>
<b>subject</b>	\$ref <a href="#">NewSubject</a> (on page 574)
<b>type</b>	object
<b>required</b>	<ul style="list-style-type: none"> <li>resourceType</li> <li>subject</li> </ul>

## ModifiedAddressExt

### Properties

<b>resourceType</b>	string
<b>description</b>	Mandatory.
	For Addresses APIs, the expected resource type is "Address". Any other value is rejected.
<b>array</b>	Address
<b>id</b>	string
<b>description</b>	Mandatory.
	The "id" attribute stores the Address resource ID for the record.
<b>maxLength</b>	64
<b>use</b>	string

**description**

Optional.

The "use" value describes the purpose of the address record.

The values provided map to WCM Address Type attribute, as follows: "home" > Residential "work" > Work "temp" > Temporary "old" > Old "mailing" > Mailing "other" > Other

If no value is provided for 'use' in the PUT request, the 'use' value of the existing record is applied.

In Watson Care Manager, the Address Type value can't be updated.

If in the PUT request, a 'use' value provided different from the one of the existing record is provided, the update request is rejected.

**enum**

- home
- work
- temp
- old
- mailing
- other

**state**

string

**description**

Optional.

This attribute stores the value for the US State. If provided, it must match one of the values of the enumeration.

**enum**

- AL
- AK
- AZ
- AR
- CA
- CO
- CT
- DE
- DC

- FL
- GA
- HI
- ID
- IL
- IN
- IA
- KS
- KY
- LA
- ME
- MD
- MA
- MI
- MN
- MS
- MO
- MT
- NE
- NV
- NH
- NJ
- NM
- NY
- NC
- ND
- OH
- OK
- OR
- PA
- PR
- RI
- SC
- SD
- TN
- TX
- UT

- VT
- VA
- WA
- WV
- WI
- WY

**country** string

**description**  
Optional.

This attribute stores the value for country. If provided, it must be US.

**array** US

**source** \$ref [CodeableConceptSource](#)  
(*on page 571*)

**originalSource** \$ref [CodeableConceptOriginalSource](#)  
(*on page 572*)

**city** string

**description**  
Optional.

This attribute stores the value for city. It is displayed in Watson Care Manager with the same name.

**maxLength** 100

**line1** string

**description**  
Optional.

This attribute stores the value for the first of 3 lines provided for address details.

**maxLength** 100

**line2** string

**description**  
Optional.

This attribute stores the value for the second of 3 lines provided for address details.

**maxLength** 100

**line3** string

**description**

Optional.

This attribute stores the value for the third of 3 lines provided for address details.

**maxLength** 100

**postalCode** string

**description**

Optional.

This attribute stores the value for the postal code.

**maxLength** 100

**identifier** array

**maxItems** 3

**description**

Optional.

The Identifier list of objects stores values of external identifiers for the enclosing record.

Identifier objects can be used to create and update records.

An external system can create record identifiers when creating or updating a record. An external system can provide up to 3 identifiers for a record, for each REST call.

An individual's record can be identified using external identifiers.

When invoking this PUT API, if identifiers provided match an address record for this individual, the record is updated. If no address record is matched, a new address record is created.

For Example: An Address record that was created providing this identifier: identifier.type.text = "ExtSys1" identifier.value = "698368"

can then be updated invoking this API and providing the same identifier.

**items** [\\$ref NewIdentifier](#)

(*on page 570*)

**period** object

**description**

Optional.

A Period object stores the start and the end date of the enclosing record.

**\$ref** [ModifiedPeriod \(\*on page 570\*\)](#)

**subject** object

**description**

A Subject object stores the reference to the Patient that the record belongs to.

**\$ref** [ModifiedSubject \(\*on page 573\*\)](#)

**type** object

**required**

- resourceType
- subject
- id

## DefaultModelError

### Properties

**Error** array

**items** [\\$ref Error \(\*on\*](#)

*page 592*)

**type** object

## Error

### Properties

**code** integer(*int32*)

**description**

A machine-readable code that identifies the problem. This does not vary with the Accept-Language setting.

**message** string

**description**

A human-readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text may change over time.

**level** string

**description**

The level of the error.

**type** object

**required**

- code
- message
- level

## (Demographics) Telecoms API

Version:v1

By using the protected APIs that follow, you can send email and phone contact updates for a client from an external system to Watson Care Manager so that Watson Care Manager accurately reflects the external system data. The API sends Watson Care Manager updates for a client's phone contact (home, mobile, work, other) or email address contact (personal, business, other). The client is identified when Watson Care Manager receives the WCM client ID or the external ID and type (with or without the client's date of birth). The client's email or phone contact record is identified when Watson Care Manager receives an identifier type and record id for each contact type.

## Servers

<https://host/Rest>

## API methods: Create a contact point

### POST /v1/ees/individual\_telecoms

Create a contact point record for a client who is registered in Watson Care Manager.

Creates a client's contact point record based on an event in the external system that initiates a transfer of valid data to Watson Care Manager.

#### Example request

##### CURL

```
curl -X POST "https://host:port/Rest/v1/ees/individual_telecoms" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Content-Type: application/json" -d "{ \"system\": {\"phone\": \"09090909\", \"use\": \"home\", \"resourceType\": \"ContactPoint\", \"source\": {\"Dept. of Justice\": {\"originalSource\": \"Officer\", \"identifier\": [ {\"value\": \"DepJu\", \"type\": {\"text\": \"345672\"} } ], \"period\": {\"start\": \"2015-12-12\", \"end\": \"2016-12-12\"}, \"subject\": {\"reference\": \"patient/identifiercode=RTSD, identifiervalue=693\" }}}}
```

##### JAVA

```
HttpResponse response = Unirest.post("https://host:port/Rest/v1/ees/individual_telecoms")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
    .header("Content-Type", "application/json")
    .body("{ \"system\": {\"phone\": \"09090909\", \"use\": \"home\", \"resourceType\": \"ContactPoint\", \"source\": {\"Dept. of Justice\": {\"originalSource\": \"Officer\", \"identifier\": [ {\"value\": \"DepJu\", \"type\": {\"text\": \"345672\"} } ], \"period\": {\"start\": \"2015-12-12\", \"end\": \"2016-12-12\"}, \"subject\": {\"reference\": \"patient/identifiercode=RTSD, identifiervalue=693\" }}}}")
    .asString();
```

## Parameters

**Referer**(*header*)

**type** string

**array** curam://foundational.app

**required**true

**X-WCM-TENANT-ID**(*header*)

**type** string

**array** The tenant ID.

**required**true

**X-WCM-TENANT-INSTANCE**(*header*)

**type** string

**array** The tenant instance.

**required**true

**Authorization**(*header*)

**type** string

**array** The Access Token.

**required**true

**X-GRANT-TYPE**(*header*)

**type** string

**array** client\_credentials

**required**true

## Request body

The inbound message that contains the information required to update a client's contact point record.

**Required:**true

**Media types**

**application/json**

**Schema** [NewContactPointCr](#)  
*(on page 617)*

## Responses

### 201

The post request was successful.

#### Headers

Name	Description	Schema
Location	The location of the new resource.	<b>type</b> string

### 400

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible errors message: EESERR161 - There are no matching individuals based on the ID entered. EESERR165 - The individual ID value provided, ..., is invalid and not in the correct format. EESERR180 - The identification details provided match multiple clients. EESERR182 - The date value provided, ..., is invalid and not in the correct format. EESERR183 - The date value provided, ..., is invalid. EESERR193 - A valid reference number or 'identifier' and 'identifierValue' or 'identifiercode' and 'identifierValue' must be provided. EESERR612 - Expected resourceType is ContactPoint. EESERR505 - Invalid 'system' provided for contact point record. EESERR642 - Failed to map values provided to WCM email type. EESERR509 - The 'use' provided for contact point 'email' is not supported. EESERR506 - The 'system' provided for contact point is not supported. EESERR507 - A 'value' must be provided if contact point is provided. EESERR508 - A 'use' for contact point must be provided if contact point is provided. EESERR602 - A 'system' must be specified if contact point is provided. EESERR643 - Failed to map values provided to WCM phone type. EESERR511 - The 'use' provided for contact point 'phone' is not supported. EESERR512 - The 'value' for contact point 'phone' must not exceed 20 characters. EESERR504 - A subject reference must be provided. EESERR635 - Failed to create a record. EESERR651 - Failed to create a record: ... EESERR357 - Values for identifier text and identifier value must be provided if identifier is provided. EESERR358 - Max number of identifiers to be provided per record is 3. EESERR350 - Identifiers for a client's record of the same type must be unique. EESERR353 - Identifier ... - ... matches multiple ContactPoint records for this person. EESERR354 - Resource id and identifier(s) match different ContactPoint records for this

person. EESERR352 - ContactPoint record with identifier ... - ... already exists for this person. EESERR359 - Resource ... is locked by another process. EESERR355 - Concurrent processing, please retry. EESERR636 - Failed to retrieve case ID for the patient. EESERR649 - Error: .... . EESERR650 - Error: .... . EESERR481 - Period start date must be before today's date. EESERR482 - Period end date must be after start date. EESERR483 - Period start date must be provided if end is provided. EESERR484 - Period start date must be after patient's birth date.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 616)*

**401**

Invalid authentication credentials for the target resource entered.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 616)*

**500**

An internal server error occurred. Contact your administrator for more information.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 616)*

**default**

An unexpected error occurred. Check the error message for more information.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 616)*

## API methods: Update a contact point

### PUT /v1/ees/individual\_telecoms

Update a contact point record for a client who is registered in Watson Care Manager.

Updates a client's contact point record assuming that a matching record is found when the external system initiates a transfer of valid data to Watson Care Manager. Watson Care Manager identifies the record to be updated based on the external identifiers that the external system provides in the body. If no matching contact point record is found, Watson Care Manager creates a new contact point record for the individual.

#### Example request

##### cURL

```
curl -X PUT "https://host:port/Rest/v1/ees/individual_telecoms" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Content-Type: application/json" -d "{ \"system\": \"phone\", \"value\": \"05059595\", \"use\": \"home\", \"resourceType\": \"ContactPoint\", \"source\": \"Local Office\", \"originalSource\": \"Officer\", \"identifier\": [ { \"value\": \"OffID\", \"type\": { \"text\": \"33677\" } }, { \"period\": { \"start\": \"2018-06-06\", \"end\": \"\" } }, { \"subject\": { \"reference\": \"patient/identifiercode=STID, identifiervalue=7772346537\" } } ] }
```

##### JAVA

```
HttpResponse response = Unirest.put("https://host:port/Rest/v1/ees/individual_telecoms")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
    .header("Content-Type", "application/json")
    .body("{ \"system\": \"phone\", \"value\": \"05059595\", \"use\": \"home\", \"resourceType\": \"ContactPoint\", \"source\": \"Local Office\", \"originalSource\": \"Officer\", \"identifier\": [ { \"value\": \"OffID\", \"type\": { \"text\": \"33677\" } }, { \"period\": { \"start\": \"2018-06-06\", \"end\": \"\" } }, { \"subject\": { \"reference\": \"patient/identifiercode=STID, identifiervalue=7772346537\" } } ] }
```

```

  \\"type\\": {          \\\"text\\": \\\"33677\\\"      }    },  \\\"period\\": {      \\\"start\\": \\\"2018-06-06\\\",      \\\"end\\": \\\"\\"
},  \\\"subject\\": {      \\\"reference\\": \\\"patient/identifiercode=STID, identifiervalue=7772346537\\\"  }})
.asString();

```

## Parameters

### **Referer**(*header*)

**type** string  
**array** curam://foundational.app  
**required** true

### **X-WCM-TENANT-ID**(*header*)

**type** string  
**array** The tenant ID.  
**required** true

### **X-WCM-TENANT-INSTANCE**(*header*)

**type** string  
**array** The tenant instance.  
**required** true

### **Authorization**(*header*)

**type** string  
**array** The Access Token.  
**required** true

### **X-GRANT-TYPE**(*header*)

**type** string  
**array** client\_credentials  
**required** true

## Request body

The inbound message that contains the information required to update a client's contact point record.

**Required:**true

### Media types

**application/json**

**Schema** [ModifiedContactPointCr](#)

(*on page 620*)

## Responses

**200**

The put request was successful.

### Media types

**application/json**

**Schema** [ModifiedContactPointExt](#)

(*on page 623*)

**400**

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error messages: EESERR161 - There are no matching individuals based on the ID entered. EESERR165 - The individual ID value provided, ..., is invalid and not in the correct format. EESERR180 - The identification details provided match multiple clients. EESERR182 - The date value provided, ..., is invalid and not in the correct format. EESERR183 - The date value provided, ..., is invalid. EESERR193 - A valid reference number or 'identifier' and 'identifierValue' or 'identifiercode' and 'identifierValue' must be provided. EESERR612 - Expected resourceType is ContactPoint. EESERR505 - Invalid 'system' provided for contact point record. EESERR642 - Failed to map values provided to WCM email type. EESERR509 - The 'use' provided for contact point 'email' is not supported. EESERR506 - The 'system' provided for contact point is not supported. EESERR507 - A 'value' must be provided if contact point is provided. EESERR508 - A 'use' for contact point must be provided if contact point is provided. EESERR602 - A 'system' must be specified if contact point is provided. EESERR643 - Failed to map values provided to WCM phone type. EESERR511 - The 'use' provided for contact point

'phone' is not supported. EESERR512 - The 'value' for contact point 'phone' must not exceed 20 characters. EESERR357 - Values for identifier text and identifier value must be provided if identifier is provided. EESERR358 - Max number of identifiers to be provided per record is 3. EESERR350 - Identifiers for a client's record of the same type must be unique. EESERR353 - Identifier ... - ... matches multiple ContactPoint records for this person. EESERR354 - Resource id and identifier(s) match different ContactPoint records for this person. EESERR623 - The record was updated by a Care manager, so it can't be updated by an external system. EESERR637 - Failed to update a record. EESERR652 - Failed to update a record: ... EESERR351 - The resource id provided doesn't exist for a ContactPoint record for this person. EESERR625 - The record was deleted by a Care manager, so it can't be reactivated by an external system. EESERR648 - Error reading the existing record . EESERR359 - Resource ... is locked by another process. EESERR355 - Concurrent processing, please retry. EESERR636 - Failed to retrieve case ID for the patient. EESERR647 - Error reading the existing record . EESERR649 - Error: .... EESERR650 - Error: .... EESERR626 - The record doesn't exist. EESERR356 - Resource ... doesn't exist. EESERR481 - Period start date must be before today's date. EESERR482 - Period end date must be after start date. EESERR483 - Period start date must be provided if end is provided. EESERR484 - Period start date must be after patient's birth date.

#### **Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 616)*

#### **401**

Invalid authentication credentials for the target resource entered.

#### **Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 616)*

#### **500**

An internal server error occurred. Contact your administrator for more information.

#### **Media types**

**application/json**

**Schema DefaultErrorModel**  
*(on page 616)*

**default**

An unexpected error occurred. Check the error message for more information.

**Media types**

**application/json**

**Schema DefaultErrorModel**  
*(on page 616)*

## API methods: Update a contact point (by ID)

**PUT /v1/ees/individual\_telecoms/{id}**

Update a contact point record for a client who is registered in Watson Care Manager.

Updates a client's contact point record assuming that a matching record is found when the external system initiates a transfer of valid data to Watson Care Manager. Watson Care Manager identifies the record to be updated based on the resource ID that the external system provides in the path and body.

**Example request**

**CURL**

```
curl -X PUT "https://host:port/Rest/v1/ees/individual_telecoms/13427653876" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Content-Type: application/json" -d "{\"system\": \"email\", \"value\": \"mypersonal@email.com\", \"use\": \"home\", \"id\": \"13427653876\", \"resourceType\": \"ContactPoint\", \"source\": \"self Reported\", \"originalSource\": \"Self reported\", \"identifier\": [ { \"value\": \"265486578\", \"type\": { \"text\": \"System7\" } }, { \"start\": \"2016-09-09\", \"end\": \"\", \"subject\": { \"reference\": \"patient/identifiercode=RTCD, identifiervalue=87546\" } } ]}
```

**JAVA**

```
HttpResponse response = Unirest.put("https://host:port/Rest/v1/ees/individual_telecoms/13427653876")
```

```

.header("accept", "application/json")

.header("Authorization", "access_token")

.header("X-GRANT-TYPE", "client_credentials")

.header("X-WCM-TENANT-INSTANCE", "Tenant Instance")

.header("X-WCM-TENANT-ID", "Tenant ID")

.header("Referer", "curam://foundational.app")

.header("Content-Type", "application/json")

.body("{ \"system\": {\"email\": \"value\": \"mypersonal@email.com\", \"use\": \"home\", \"id\": \"13427653876\", \"resourceType\": \"ContactPoint\", \"source\": \"self Reported\", \"originalSource\": \"Self reported\", \"identifier\": [ { \"value\": \"265486578\", \"type\": { \"text\": \"System7\" } }, { \"start\": \"2016-09-09\", \"end\": \"\", \"subject\": { \"reference\": \"patient/identifiercode=RTCD, identifiervalue=87546\" } } ] }, \"period\": { \"start\": \"2016-09-09\", \"end\": \"\", \"subject\": { \"reference\": \"patient/identifiercode=RTCD, identifiervalue=87546\" } } }")

.asString();

```

## Parameters

### **Referer(header)**

**type** string

**array** curam://foundational.app

**required** true

### **X-WCM-TENANT-ID(header)**

**type** string

**array** The tenant ID.

**required** true

### **X-WCM-TENANT-INSTANCE(header)**

**type** string

**array** The tenant instance.

**required** true

### **Authorization(header)**

**type** string

**array** The Access Token.

**required** true

**X-GRANT-TYPE**(*header*)

**type** string

**array** client\_credentials

**required** true

**id**(*path*)

Mandatory.

The "id" attribute holds the resource ID of the ContactPoint record.

**type** string

**maxLength** 900

**required** true

## Request body

**Required:**true

**Media types**

application/json

**Schema** [ModifiedContactPointExt](#)

(on page 623)

## Responses

**200**

The put request was successful.

**Media types**

application/json

**Schema** [ModifiedContactPointExt](#)

(on page 623)

**400**

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error messages: EESERR161 - There are no matching individuals based on the ID entered. EESERR165 - The individual ID value provided, ..., is invalid and not in the correct format. EESERR180 - The identification details provided match multiple clients. EESERR182 - The date value provided, ..., is invalid and not in the correct format. EESERR183 - The date value provided, ..., is invalid. EESERR193 - A valid reference number or 'identifier' and 'identifierValue' or 'identifiercode' and 'identifierValue' must be provided. EESERR612 - Expected resourceType is ContactPoint. EESERR505 - Invalid 'system' provided for contact point record. EESERR642 - Failed to map values provided to WCM email type. EESERR509 - The 'use' provided for contact point 'email' is not supported. EESERR506 - The 'system' provided for contact point is not supported. EESERR507 - A 'value' must be provided if contact point is provided. EESERR508 - A 'use' for contact point must be provided if contact point is provided. EESERR602 - A 'system' must be specified if contact point is provided. EESERR643 - Failed to map values provided to WCM phone type. EESERR511 - The 'use' provided for contact point 'phone' is not supported. EESERR512 - The 'value' for contact point 'phone' must not exceed 20 characters. EESERR357 - Values for identifier text and identifier value must be provided if identifier is provided. EESERR358 - Max number of identifiers to be provided per record is 3. EESERR350 - Identifiers for a client's record of the same type must be unique. EESERR353 - Identifier ... - ... matches multiple ContactPoint records for this person. EESERR354 - Resource id and identifier(s) match different ContactPoint records for this person. EESERR623 - The record was updated by a Care manager, so it can't be updated by an external system. EESERR637 - Failed to update a record. EESERR652 - Failed to update a record: ... EESERR351 - The resource id provided doesn't exist for a ContactPoint record for this person. EESERR625 - The record was deleted by a Care manager, so it can't be reactivated by an external system. EESERR648 - Error reading the existing record. EESERR359 - Resource ... is locked by another process. EESERR355 - Concurrent processing, please retry. EESERR636 - Failed to retrieve case ID for the patient. EESERR647 - Error reading the existing record. EESERR649 - Error: .... EESERR650 - Error: .... EESERR626 - The record doesn't exist. EESERR356 - Resource ... doesn't exist. EESERR481 - Period start date must be before today's date. EESERR482 - Period end date must be after start date. EESERR483 - Period start date must be provided if end is provided. EESERR484 - Period start date must be after patient's birth date.

#### **Media types**

**application/json**

**Schema** [DefaultErrorModel](#)*(on page 616)***401**

Invalid authentication credentials for the target resource entered.

**Media types****application/json****Schema** [DefaultErrorModel](#)*(on page 616)***500**

An internal server error occurred. Contact your administrator for more information.

**Media types****application/json****Schema** [DefaultErrorModel](#)*(on page 616)***default**

An unexpected error occurred. Check the error message for more information.

**Media types****application/json****Schema** [DefaultErrorModel](#)*(on page 616)*

## API methods: Delete a contact point

**DELETE /v1/ees/individual\_telecoms/{id}**

Delete a contact point record for a client who is registered in Watson Care Manager.

Deletes a client's contact point record based on a delete event in the external system that initiates a transfer of information to Watson Care Manager. Watson Care Manager identifies the record to be deleted based on the resource ID that the external system provides.

## Example request

cURL

```
curl -X DELETE "https://host:port/Rest/v1/ees/individual_telecoms/586789" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials"
```

JAVA

```
HttpResponse response = Unirest.delete("https://host:port/Rest/v1/ees/individual_telecoms/586789")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("Referer", "curam://foundational.app")
    .asString();
```

## Parameters

### Referer(*header*)

**type** string  
**array** curam://foundational.app

**required** true

### X-WCM-TENANT-ID(*header*)

**type** string  
**array** The tenant ID.

**required** true

### X-WCM-TENANT-INSTANCE(*header*)

**type** string  
**array** The tenant instance.

**required** true

**Authorization(*header*)**

**type** string

**array** The Access Token.

**required** true

**X-GRANT-TYPE(*header*)**

**type** string

**array** client\_credentials

**required** true

**id(*path*)**

Mandatory.

The "id" attribute holds the resource ID of the ContactPoint record to be deleted.

**type** string

**maxLength** 64

**required** true

## Responses

### 204

The delete request was successful.

### 400

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error messages returned:

EESERR624 - The record was updated by a Care Manager, so it can't be deleted by an external system. EESERR638 - Failed to delete a record. EESERR653 - Failed to delete a record: .... .  
EESERR359 - Resource ... is locked by another process. EESERR355 - Concurrent processing, please retry. EESERR636 - Failed to retrieve case ID for the patient. EESERR647 - Error reading

the existing record . EESERR649 - Error: ... . EESERR650 - Error: ... . EESERR626 - The record doesn't exist. EESERR356 - Resource ... doesn't exist.

**Media types**

**application/json**

**Schema** [ModelError](#)

*(on page 616)*

**401**

Invalid authentication credentials for the target resource entered.

**Media types**

**application/json**

**Schema** [ModelError](#)

*(on page 616)*

**500**

An internal server error occurred. Contact your administrator for more information.

**Media types**

**application/json**

**Schema** [ModelError](#)

*(on page 616)*

**default**

An unexpected error occurred. Check the error message for more information.

**Media types**

**application/json**

**Schema** [ModelError](#)

*(on page 616)*

## Components

## Schemas

### NewPeriod

#### Properties

**start** string(*date*)

**description**

Optional.

The start date of the record. The expected format is yyyy-MM-dd.

**end** string(*date*)

**description**

Optional.

The end date of the record. If provided, the start date must also be provided. The expected format is yyyy-MM-dd.

**type** object

### ModifiedPeriod

#### Properties

**start** string(*date*)

**description**

Optional.

The start date of the record. The expected format is yyyy-MM-dd.

**end** string(*date*)

**description**

Optional.

The end date of the record. If provided, the start date must also be provided. The expected format is yyyy-MM-dd.

**type** object

### NewIdentifier

#### Properties

**value** string

**description**

Optional.

This attribute stores the external identifier value. If provided, a type.text value must be provided.

**maxLength** 100

**type** \$ref [NewCodeableConcept](#)

(*on page 610*)

**type** object

## NewCodeableConcept

### Properties

**text** string

**description**

Optional.

This attribute stores the value for the identifier type. It must be provided if an identifier value is provided.

**maxLength** 100

**type** object

## CodeableConceptSource

### Properties

**text** string

**description**

Optional

Textual description of codeable concept.

**coding** array

**maxItems** 1

**items**     \$ref CodingSource  
*(on page  
 611)*

**type** object

## CodingSource

### Properties

**system** string

**description**  
 Required.

"http://wcm/source" for source.

**array**     http://wcm/source

**code**   string

**description**  
 Required. The "code" value  
 describes the source system.  
 The value provided maps to  
 Watson Care Manager Source  
 System

**maxLength** 20

**type** object

**array** code

## CodeableConceptOriginalSource

### Properties

**text**   string

**description**  
 Optional

Textual description of codeable concept.

**coding** array

**maxItems** 1

**items**     \$ref [CodingOriginalSource](#)  
*(on page 612)*

**type** object

## CodingOriginalSource

### Properties

**system** string

**description**  
Required.

"http://wcm/originalsource" for orginal source.

**array**     [http://wcm/originalsource](#)

**code**   string

**description**  
Required. The "code" value describes the original source system. The value provided maps to Watson Care Manager Original Source System

**maxLength** 20

**type** object

**array** code

## ModifiedSubject

### Properties

**reference** string

**description**  
The Subject object is used to identify an individual in Watson Care Manager.

The "reference" String is expected to contain identifier details that are used to match an individual in Watson Care Manager.

The string is parsed to extract query parameters and associated values. It can contain a combination of

(1) WCM Patient ID (i.e. WCM Reference Number), (2) WCM Identification External System Reference and Identification number, (3) WCM Identification Type and Identification number, (4) WCM Identification External System Reference and Identification number and birthDate, (5) WCM Identification Type and Identification number and birthDate.

For example:

(1) WCM Patient ID

```
"subject":{  
    "reference" : "patient/123      " }
```

(2) WCM Identification External System Reference and Identification number

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239" }
```

(3) WCM Identification External System Reference and Identification number,

```
"subject":{  
    "reference" : "patient/identifier=Passport, identifiervalue=239" }
```

(4) WCM Identification External System Reference and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239,  
    birthDate=19380821" }
```

(5) WCM Identification Type and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=Passport, identifiervalue=239,  
    birthDate=19380821" }
```

**maxLength 150**

**type object**

## NewSubject

### Properties

**reference** string

#### description

The Subject object is used to identify an individual in Watson Care Manager.

The "reference" String is expected to contain identifier details that are used to match an individual in Watson Care Manager.

The string is parsed to extract query parameters and associated values. It can contain a combination of

(1) WCM Patient ID (i.e. WCM Reference Number), (2) WCM Identification External System Reference and Identification number, (3) WCM Identification Type and Identification number, (4) WCM Identification External System Reference and Identification number and birthDate, (5) WCM Identification Type and Identification number and birthDate.

For example:

(1) WCM Patient ID

```
"subject": {
    "reference" : "patient/123" }
```

(2) WCM Identification External System Reference and Identification number

```
"subject": {
    "reference" : "patient/identifiercode=xwz, identifiervalue=239" }
```

(3) WCM Identification External System Reference and Identification number,

```
"subject": {
    "reference" : "patient/identifier=Passport, identifiervalue=239" }
```

(4) WCM Identification External System Reference and Identification number and birthDate,

```

"subject":{

  "reference" : "patient/identifiercode=xwz, identifiervalue=239,
  birthDate=19380821" }

```

(5) WCM Identification Type and Identification number and birthDate,

```

"subject":{

  "reference" : "patient/identifiercode=Passport, identifiervalue=239,
  birthDate=19380821" }

```

**maxLength** 150

**type** object

## ModifiedIdentifier

### Properties

**value** string

**description**

Optional.

This attribute stores the external identifier value. If provided, a type.text value must be provided.

**maxLength** 100

**type** object

**description**

Optional. This object stores the value for the Identifier type.

**\$ref**      [ModifiedCodeableConcept \(on page 615\)](#)

**type** object

## ModifiedCodeableConcept

### Properties

**text** string

**description**

Optional.

This attribute stores the value for the Identification type. It must be provided if an identifier value is provided.

**maxLength** 100

**type** object

## DefaultModelError

### Properties

**Error** array

**items \$ref** Error (*on*

*page*

*616*)

**type** object

## Error

### Properties

**code** integer(*int32*)

#### **description**

A machine-readable code that identifies the problem. This does not vary with the Accept-Language setting.

**message** string

#### **description**

A human-readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text may change over time.

**level** string

#### **description**

The level of the error.

**type** object

**required**

- code
- message
- level

**NewContactPointCr****Properties****resourceType** string**description**

Mandatory.

The expected resource type for Telecoms API is "ContactPoint". Any other value is rejected.

**array** ContactPoint**system** string**description**

Mandatory.

This attribute defines the communications system that is required to make use of the contact. The value that is provided for this attribute determines whether the ContactPoint record is a Watson Care Manager Email or Phone data type. If 'phone' is provided, this corresponds to a Watson Care Manager Phone record. If 'email' is provided, this corresponds to a Watson Care Manager Email record.

**enum**

- phone
- email

**value** string**description**

Mandatory.

This attribute stores the actual contact point details. If the "system" for the ContactPoint record is 'phone', the value must not exceed 20 characters.

**maxLength** 256

**use** string

**description**

Optional.

The "use" attribute describes the purpose of the ContactPoint record.

If the "system" for the ContactPoint record is 'phone', the use value will be mapped to a Phone Type, as follows: "home" > Home "work" > Work "temp" > Temporary "mobile" > Mobile "old" > Old

If no value is provided, the Watson Care Manager default value of Home will be applied to Phone Type.

If the "system" for the ContactPoint record is 'email', the use value will be mapped to a Email Type, as follows: "home" > Personal "work" > Work "temp" > Temporary "old" > Old

If no value is provided, the Watson Care Manager default value of Personal will be applied to Email type. A mobile "use" for an email will be rejected.

**enum**

- home
- work
- temp
- mobile
- old

**source** \$ref [CodeableConceptSource](#)

*(on page 610)*

**originalSource** \$ref [CodeableConceptOriginalSource](#)

*(on page 611)*

**identifier** array

**description**

Optional.

The Identifier list of objects stores values of external identifiers for the enclosing record.

Identifier objects can be used to create and update records.

An external system can provide up to 3 identifiers for a record.

When a record is created with an external identifier, the same identifier that is provided can be used to identify a record. Therefore send a PUT request to update the record.

For Example: A contactPoint record is created providing an identifier with the following values: identifier.type.text = "ExtSys1" identifier.value = "698368" A PUT request with an updated content and identifier as follows: identifier.type.text = "ExtSys1" identifier.value = "698368" can be sent using the following url: / Rest/v1/ees/individual\_telecoms The contactPoint record will be updated.

**maxItems** 3

**items** \$ref [NewIdentifier](#)  
*(on page 609)*

**period** object

**description**  
Optional.

A Period object stores the start and the end date of the enclosing record.

\$ref [NewPeriod \(on page 609\)](#)

**subject** object

**description**  
A Subject object stores the reference to the Patient the record belongs to.

\$ref [NewSubject \(on page 614\)](#)

**type** object

**required**

- system
- resourceType

- subject
- value

## ModifiedContactPointCr

### Properties

**resourceType** string

**description**

Mandatory.

The expected resource type for Telecoms API is "ContactPoint". Any other value is rejected.

**array** ContactPoint

**system** string

**description**

Mandatory.

This attribute defines the communications system that is required to make use of the contact. The value provided for this attribute determines whether the ContactPoint record is a Watson Care Manager Email or Phone data type. A ContactPoint record that is created as an Email can't be updated providing a 'phone' system.

**enum**

- phone
- email

**value** string

**description**

Mandatory.

This attribute stores the actual contact point details. If the "system" for the ContactPoint record is 'phone', the value must not exceed 20 characters.

**maxLength** 256

**use** string

**description**

Optional.

The "use" attribute describes the purpose of the ContactPoint record.

If the "system" for the ContactPoint record is 'phone', the use value will be mapped to a Phone Type, as follows: "home" > Home "work" > Work "temp" > Temporary "mobile" > Mobile "old" > Old

If no value is provided, the Watson Care Manager default value of Home is applied to Phone Type.

If the "system" for the ContactPoint record is 'email', the use value will be mapped to a Email Type, as follows: "home" > Personal "work" > Work "temp" > Temporary "old" > Old

If no value is provided, the Watson Care Manager default value of Personal is applied to Email type. A mobile "use" for an email is rejected.

**enum**

- home
- work
- temp
- mobile
- old

**source**      \$ref [CodeableConceptSource](#)

(*on page 610*)

**originalSource** \$ref [CodeableConceptOriginalSource](#)

(*on page 611*)

**identifier**    array

**description**

Optional.

The Identifier list of objects stores values of external identifiers for the enclosing record.

Identifier objects can be used to create and update records.

An external system can create record identifiers when creating or updating a record. An external system can provide up to 3 identifiers for a record, for each REST call.

An individual's record can be identified using external identifiers.

When invoking this PUT API, if identifiers that are provided match a contactPoint record for this individual, the record is updated. If no contactPoint record is matched, a new contactPoint record is created.

For Example: A contactPoint record that was created providing this identifier: identifier.type.text = "ExtSys1" identifier.value = "698368" can then be updated invoking this API and providing the same identifier.

**maxItems** 3

**items** [\\$ref ModifiedIdentifier](#)  
*(on page 615)*

**period** object

**description**  
Optional.

A Period object stores the start and the end date of the enclosing record.

[\\$ref ModifiedPeriod \(on page 609\)](#)

**subject** object

**description**  
A Subject object stores the reference to the Patient the record belongs to.

[\\$ref ModifiedSubject \(on page 612\)](#)

**type** object

**required**

- system
- resourceType
- subject
- value

## ModifiedContactPointExt

### Properties

**resourceType** string

**description**  
Mandatory.

The expected resource type for Telecoms API is "ContactPoint". Any other value is rejected.

**array** ContactPoint

**id** string

**description**  
Mandatory.

The "id" attribute stores the resource ID of the ContactPoint record.

**maxLength** 900

**system** string

**description**  
Mandatory.

This attribute defines the communications system that is required to make use of the contact. The value that is provided for this attribute determines whether the ContactPoint record is a Watson Care Manager Email or Phone data type. A ContactPoint record created as an Email can't be updated providing a 'phone' system.

**enum**

- phone
- email

**value** string

**description**  
Mandatory.

This attribute stores the actual contact point details. If the "system" for the ContactPoint record is 'phone', the value must not exceed 20 characters.

**maxLength** 256

**use** string

**description**

Optional.

The "use" attribute describes the purpose of the ContactPoint record.

If the "system" for the ContactPoint record is 'phone', the use value will be mapped to a Phone Type, as follows: "home" > Home "work" > Work "temp" > Temporary "mobile" > Mobile "old" > Old

If no value is provided, the Watson Care Manager default value of Home is applied to Phone Type.

If the "system" for the ContactPoint record is 'email', the use value will be mapped to a Email Type, as follows: "home" > Personal "work" > Work "temp" > Temporary "old" > Old

If no value is provided, the Watson Care Manager default value of Personal is applied to Email type. A mobile "use" for an email will be rejected.

**enum**

- home
- work
- temp
- mobile
- old

**source** \$ref [CodeableConceptSource](#)

(*on page 610*)

**originalSource** \$ref [CodeableConceptOriginalSource](#)

(*on page 611*)

**identifier** array

**maxItems** 3

**description**

Optional.

The Identifier list of objects stores values of external identifiers for the enclosing record.

Identifier objects can be used to create and update records.

An external system can create record identifiers when creating or updating a record. An external system can provide up to 3 identifiers for a record, for each REST call.

An individual's record can be identified using external identifiers.

When invoking this PUT API, identifiers are evaluated before they are added to the record to be updated:

- If no other contactPoint record exists with any of these identifiers exist for this individual, the identifiers are added to this record in Watson Care Manager.
- If another contactPoint record already exists in Watson Care Manager for this individual with one of the identifiers provided, the request fails.
- If identifiers already exist for a contactPoint record for this individual and the resource ID provided is the one of the contactPoint record, the update is successful.

**items**      \$ref [ModifiedIdentifier](#)  
*(on page 615)*

**period**      object

**description**  
Optional.

A Period object stores the start and the end date of the enclosing record.

\$ref      [ModifiedPeriod \(on page 609\)](#)

**subject**      object

**description**  
A Subject object stores the reference to the Patient the record belongs to.

\$ref      [ModifiedSubject \(on page 612\)](#)

**type**      object

**required**

- system
- resourceType
- subject
- value

## Client Demographics API

Version:v1

By using the protected APIs that follow, you can send updates to a client's demographics details from an external system to Watson Care Manager, which includes a client's date of birth and death, gender, and marital status. The client is identified when Watson Care Manager receives the WCM client ID or the external ID and type. The client's demographics record is identified when Watson Care Manager receives an identifier type and record id for each data type.

### Servers

[host/Rest](#)

#### API methods: Update a client's demographic details (by ID)

**PUT /v1/ees/individual\_headers/{id}**

Update the demographic details of a client who is registered in Watson Care Manager.

Updates a client's date of birth/death, gender, and marital status records assuming that a matching record is found when the external system initiates a transfer of valid data to Watson Care Manager. Watson Care Manager identifies the record to be updated based on the individual's resource ID that the external system provides in the path and the body.

#### Example request

cURL

```
curl -X PUT "https://host:port/v1/ees/individual_headers/375476597" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "accept: application/json" -H "Content-Type: application/json" -d "{ \"id\": \"375476597\", \"active\": true, \"birthDate\": \"1999-03-03\", \"deceasedBoolean\": false, \"deceasedDate\": \"\", \"resourceType\": \"Patient\", \"source\": \"Reported by Care Assistant\", \"originalSource\": \"Self\" }
```

```

reported\", \"maritalStatus\": { \"coding\": [ { \"system\": \"http://hl7.org/fhir/v3/MaritalStatus\",
  \"code\": \"D\" } ], \"period\": { \"start\": \"2018-02-03\", \"end\": \"\" } },
  \"gender\": { \"gender\": \"male\", \"period\": { \"start\": \"\", \"end\": \"\" } } }"

```

JAVA

```

HttpResponse response = Unirest.put("https://host:port/Rest/v1/ees/individual_headers/375476597")
  .header("accept", "application/json")
  .header("Authorization", "access_token")
  .header("X-GRANT-TYPE", "client_credentials")
  .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
  .header("X-WCM-TENANT-ID", "Tenant ID")
  .header("Referer", "curam://foundational.app")
  .header("Content-Type", "application/json")
  .body("{\"id\": \"375476597\", \"active\": true, \"birthDate\": \"1999-03-03\", \"deceasedBoolean\": false,
  \"deceasedDate\": \"\", \"resourceType\": \"Patient\", \"source\": \"Reported by Care Assistant\",
  \"originalSource\": \"Self reported\", \"maritalStatus\": { \"coding\": [ { \"system\": \"http://hl7.org/fhir/v3/MaritalStatus\",
    \"code\": \"D\" } ], \"period\": { \"start\": \"2018-02-03\", \"end\": \"\" } }, \"gender\": { \"gender\": \"male\", \"period\": { \"start\": \"\",
      \"end\": \"\" } } }")
  .asString();

```

## Parameters

### **Referer(header)**

**type** string

**array** curam://foundational.app

**required** true

### **X-WCM-TENANT-ID(header)**

**type** string

**array** The tenant ID.

**required** true

### **X-WCM-TENANT-INSTANCE(header)**

**type** string

**array** The tenant instance.

**required** true

#### **Authorization(header)**

**type** string

**array** The Access Token.

**required** true

#### **X-GRANT-TYPE(header)**

**type** string

**array** client\_credentials

**required** true

#### **id(path)**

Mandatory.

The "id" attribute holds the Individual resource ID. This corresponds to the Watson Care Manager Client Reference Number.

**type** string

**maxLength** 900

**required** true

### **Request body**

The inbound message that contains the information required to update a client's demographic details.

**Required:**true

#### **Media types**

**application/json**

**Schema** [PatientUpdateExt](#)

*(on page 635)*

## Responses

### 200

The put request was successful.

#### Media types

**application/json**

**Schema** [PatientUpdateExt](#)

(*on page 635*)

### 400

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error messages:

EESERR359 - Resource ... is locked by another process. EESERR355 - Concurrent processing, please retry. EESERR636 - Failed to retrieve case ID for the patient. EESERR647 - Error reading the existing record . EESERR481 - Period start date must be before today's date. EESERR482 - Period end date must be after start date. EESERR483 - Period start date must be provide if end is provided. EESERR484 - Period start date must be after patient's birth date. EESERR610 - Expected resourceType is Patient. EESERR503 - Patien's status must be active. EESERR485 - Patient's birth date must be provided. EESERR486 - Patien's birth date must be before today's date. EESERR488 - Deceased date can't be before date of birth. EESERR489 - Deceased date can't be in the future. EESERR493 - Only accepted system for marital status code is fhir Marital status. EESERR494 - A marital status code must be provided when Marital status is provided. EESERR495 - Invalid code provided for 'marital status'. EESERR501 - A gender value must be provided. EESERR502 - Invalid code provided for 'gender'. EESERR633 - ... record can't be updated or created if the care manager doesn't add an end date. EESERR634 - Invalid request. EESERR644 - Failed to map values provided to WCM gender type. EESERR645 - Failed to map values provided to WCM marital status type. EESERR635 - Failed to create a record. EESERR651 - Failed to create a record: ... EESERR640 - Failed to map values provided to WCM birth/death type. EESERR623 - The record was updated by a Care manager, so it can't be updated by an external system. EESERR637 - Failed to update a record. EESERR652 - Failed to update a record: ... EESERR648 - Error reading the existing record .

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 644)*

**401**

Invalid authentication credentials for the target resource entered.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 644)*

**500**

An internal server error occurred. Contact your administrator for more information.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 644)*

**default**

An unexpected error occurred. Check the error message for more information.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 644)*

## API methods: Update a client's demographic details

**PUT /v1/ees/individual\_headers**

Update the demographic details of a client who is registered in Watson Care Manager.

Updates a client's date of birth/death, gender, and marital status records assuming that a matching record is found when the external system initiates a transfer of valid data to Watson Care Manager. Watson

Care Manager identifies the record to be updated based on the individual's identification details that the external system provides in the Subject reference field.

### Example request

CURL

```
curl -X PUT "https://host:port/Rest/v1/ees/individual_headers" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Content-Type: application/json" -d "{ \"resourceType\": \"Patient\", \"active\": true, \"birthDate\": \"1998-09-01\", \"deceasedBoolean\": false, \"deceasedDate\": \"\", \"source\": \"Self reported\", \"originalSource\": \"N.a.\", \"maritalStatus\": { \"coding\": [ { \"system\": \"http://hl7.org/fhir/v3/MaritalStatus\", \"code\": \"D\" } ], \"period\": { \"start\": \"2018-03-01\", \"end\": \"\" }, \"gender\": { \"male\": \"\", \"period\": { \"start\": \"\", \"end\": \"\" }, \"subject\": { \"reference\": \"patient/identifiercode=YUTR\", identifiervalue=7838984 } } }}
```

JAVA

```
HttpResponse response = Unirest.put("https://host:port/Rest/v1/ees/individual_headers/375476597")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
    .header("Content-Type", "application/json")
    .body("{ \"resourceType\": \"Patient\", \"active\": true, \"birthDate\": \"1998-09-01\", \"deceasedBoolean\": false, \"deceasedDate\": \"\", \"source\": \"Self reported\", \"originalSource\": \"N.a.\", \"maritalStatus\": { \"coding\": [ { \"system\": \"http://hl7.org/fhir/v3/MaritalStatus\", \"code\": \"D\" } ], \"period\": { \"start\": \"2018-03-01\", \"end\": \"\" }, \"gender\": { \"male\": \"\", \"period\": { \"start\": \"\", \"end\": \"\" }, \"subject\": { \"reference\": \"patient/identifiercode=YUTR\", identifiervalue=7838984 } } } }")
    .asString();
```

### Parameters

**Referer(header)**

**type** string  
**array** curam://foundational.app

**required** true

**X-WCM-TENANT-ID**(*header*)

**type** string  
**array** The tenant ID.

**required** true

**X-WCM-TENANT-INSTANCE**(*header*)

**type** string  
**array** The tenant instance.

**required** true

**Authorization**(*header*)

**type** string  
**array** The Access Token.

**required** true

**X-GRANT-TYPE**(*header*)

**type** string  
**array** client\_credentials

**required** true

## Request body

The inbound message that contains the information required to update a client's demographic details.

**Required:**true

**Media types**

application/json

**Schema** [PatientUpdate](#)

([on page  
639](#))

## Responses

### 200

The put request was successful.

#### Media types

**application/json**

**Schema** [PatientUpdateRet](#)

([on page 637](#))

### 400

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error messages:

EESERR161 - There are no matching individuals based on the ID entered. EESERR193 - A valid reference number or 'identifier' and 'identifierValue' or or 'identifiercode' and 'identifierValue' must be provided. EESERR182 - The date value provided, %1s, is invalid and not in the correct format. EESERR183 - The date value provided, %1s, is invalid. EESERR165 - The individual ID value provided, %1s, is invalid and not in the correct format. EESERR180 - The identification details provided match multiple clients. EESERR359 - Resource %1s is locked by another process. EESERR355 - Concurrent processing, please retry. EESERR636 - Failed to retrieve case ID for the patient. EESERR647 - Error reading the existing record . EESERR481 - Period start date must be before today's date. EESERR482 - Period end date must be after start date. EESERR483 - Period start date must be provide if end is provided. EESERR484 - Period start date must be after patient's birth date. EESERR610 - Expected resourceType is Patient. EESERR503 - Patient's status must be active. EESERR485 - Patient's birth date must be provided. EESERR486 - Patient's birth date must be before today's date. EESERR488 - Deceased date can't be before date of birth. EESERR489 - Deceased date can't be in the future. EESERR493 - Only accepted system for marital status code is fhir Marital status. EESERR494 - A marital status code must be provided when Marital status is provided. EESERR495 - Invalid code provided for 'marital status'. EESERR501 - A gender value must be provided. EESERR502 - Invalid code provided for 'gender'. EESERR633 - ... record can't be updated or created if the care manager doesn't

add an end date. EESERR634 - Invalid request. EESERR644 - Failed to map values provided to WCM gender type. EESERR645 - Failed to map values provided to WCM marital status type. EESERR635 - Failed to create a record. EESERR651 - Failed to create a record: ... EESERR640 - Failed to map values provided to WCM birth/death type. EESERR623 - The record was updated by a Care manager, so it can't be updated by an external system. EESERR637 - Failed to update a record. EESERR652 - Failed to update a record: ... EESERR648 - Error reading the existing record .

**Media types**

**application/json**

**Schema** [ModelError](#)

*(on page 644)*

**401**

Invalid authentication credentials for the target resource entered.

**Media types**

**application/json**

**Schema** [ModelError](#)

*(on page 644)*

**500**

An internal server error occurred. Contact your administrator for more information.

**Media types**

**application/json**

**Schema** [ModelError](#)

*(on page 644)*

**default**

An unexpected error occurred. Check the error message for more information.

**Media types**

**application/json**

**Schema** [ModelError](#)

*(on page 644)*

## Components

### Schemas

#### PatientUpdateExt

##### Properties

**resourceType** string

**description** Mandatory.

For updates, the expected resource type is "Patient". Any other value is rejected.

**array** Patient

**id** string

**description** Mandatory.

The "id" attribute stores the individual resource ID. This corresponds to the WCM Client Reference Number.

**maxLength** 900

**active** boolean

**description** Mandatory.

The "active" boolean attribute stores the status of the individual. Only updates with an active status are accepted.

**default** true

**birthDate** string(*date*)

**description** Mandatory.

The "birthDate" represents the date of birth of the individual. Accepted format is yyyy-MM-dd.

**deceasedBoolean** boolean

**description**

Optional.

The "deceasedBoolean" boolean attribute communicates the deceased status of an individual. If a "true" value is received and no deceasedDate is provided, the date of death is set to the date of the received update.

**deceasedDate** string(*date*)

**description**

Optional.

The "deceasedDate" is the date of death of the individual.  
Accepted format is yyyy-MM-dd.

**source** string

**description**

Optional.

The "source" attribute stores the source value for birth date, gender, marital status records.

**maxLength** 100

**originalSource** string

**description**

Optional.

The "originalSource" attribute stores the source value for birth date, gender, marital status records.

**maxLength** 100

**maritalStatus** object

**description**

Marital (civil) status of a Patient.

**\$ref** [CodeableConceptMS \(on page 642\)](#)

**gender** object

**\$ref** Gender  
*(on page 643)*

**type** object

**required**

- id
- active
- birthDate
- resourceType
- gender

## PatientUpdateRet

### Properties

**resourceType** string

**description** Mandatory.

For updates, the expected resource type is "Patient". Any other value is rejected.

**array** Patient

**active** boolean

**description** Mandatory.

The "active" boolean attribute stores the status of the individual. Only updates with an active status are accepted.

**default** true

**birthDate** string(*date*)

**description** Mandatory.

The "birthDate" represents the date of birth of the individual. Accepted format is yyyy-MM-dd.

**deceasedBoolean** boolean

**description**

Optional.

The "deceasedBoolean" boolean attribute communicates the deceased status of an individual. If a "true" value is received and no deceasedDate is provided, the date of death is set to the date of the received update.

**deceasedDate** string(*date*)

**description**

Optional.

The "deceasedDate" is the date of death of the individual.  
Accepted format is yyyy-MM-dd.

**source** string

**description**

Optional.

The "source" attribute stores the source value for birth date, gender, marital status records.

**maxLength** 100

**originalSource** string

**description**

Optional.

The "originalSource" attribute stores the source value for birth date, gender, marital status records.

**maxLength** 100

**maritalStatus** object

**description**

Marital (civil) status of an individual.

**\$ref** [CodeableConceptMS \(on page 642\)](#)

**gender** object

**\$ref** [Gender](#)  
*(on page 643)*

**subject** object

**description**  
A Subject object stores the reference to the individual the record belongs to.

**\$ref** [Subject \(on page 645\)](#)

**type** object

#### required

- active
- birthDate
- resourceType
- gender
- subject

## PatientUpdate

### Properties

**resourceType** string

**description**  
Mandatory.

For updates, the expected resource type is "Patient". Any other value is rejected.

**array** Patient

**active** boolean

**description**  
Mandatory.

The "active" boolean attribute stores the status of the individual. Only updates with an active status are accepted.

**default** true

**birthDate** string(*date*)

**description**

Mandatory.

The "birthDate" represents the date of birth of the individual.

Accepted format is yyyy-MM-dd.

**deceasedBoolean** boolean

**description**

Optional.

The "deceasedBoolean" boolean attribute communicates the deceased status of an individual. If a "true" value is received and no deceasedDate is provided, the date of death is set to the date of the received update.

**deceasedDate** string(*date*)

**description**

Optional.

The "deceasedDate" is the date of death of the individual.

Accepted format is yyyy-MM-dd.

**source** string

**description**

Optional.

The "source" attribute stores the source value for birth date, gender, marital status records.

**maxLength** 100

**originalSource** string

**description**

Optional.

The "originalSource" attribute stores the source value for birth date, gender, marital status records.

**maxLength** 100

**maritalStatus** object

**description**

Marital (civil) status of an individual.

<b>\$ref</b>	<a href="#">CodeableConceptMS (on page 642)</a>
<b>gender</b>	object
	<b>\$ref</b> <a href="#">Gender (on page 643)</a>
<b>subject</b>	object
	<b>description</b> A Subject object holds the reference to the individual the record belongs to.
	<b>\$ref</b> <a href="#">Subject (on page 645)</a>
<b>type</b>	object
<b>required</b>	<ul style="list-style-type: none"> <li>• active</li> <li>• birthDate</li> <li>• resourceType</li> <li>• gender</li> <li>• subject</li> </ul>

## Period

### Properties

**start** string(*date*)

**description**  
Optional.

The start date of the record.

The expected format is yyyy-MM-dd.

**end** string(*date*)

**description**  
Optional.

The end date of the record.

If provided, the start date must also be provided.

The expected format is yyyy-MM-dd.

**type** object

## CodeableConceptMS

### Properties

**coding** array

**maxItems** 1

**items** \$ref [CodingMS](#)

([on page 642](#))

**period** object

**description**

Optional.

A Period object stores the start and the end date of the enclosing record.

**\$ref** [Period \(on page 641\)](#)

**type** object

## CodingMS

### Properties

**system** string

**description**

Optional.

If provided, it must be "http://hl7.org/fhir/v3/MaritalStatus".

<b>array</b>	http://hl7.org/fhir/v3/MaritalStatus
<b>code</b>	string

#### **description**

Optional. The "code" value describes the civil marital status of the individual. The value provided maps to Watson Care Manager Marital Status attribute, as follows: "D" > Divorced "L" > Legally Separated "M" > Married "T" > Life Partner "S" > Single "U" > Single "W" > Widowed "UNK" > Not Disclosed / Unknown "A" > Annulled "I" > Interlocutory "P" > Polygamous

#### **enum**

- D
- L
- M
- T
- S
- U
- W
- UNK
- A
- I
- P

### **type object**

## **Gender**

### **Properties**

<b>gender</b>	string
---------------	--------

#### **description**

Mandatory.

The "gender" attribute is used to submit the individual's gender.

#### **enum**

- male
- female

- other
- unknown

**period** object

**description**

Optional.

A Period object stores the start and the end date of the enclosing record.

**\$ref**

[Period \(on page 641\)](#)

**type** object

**array** gender

## DefaultModelError

### Properties

**Error** array

**items \$ref** [Error \(on](#)

[page](#)

[644\)](#)

**type** object

## Error

### Properties

**code** integer(*int32*)

**description**

A machine-readable code that identifies the problem. This does vary with the Accept-Language setting.

**message** string

**description**

A human-readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text may change over time.

**level** string

**description**

The level of the error.

**type** object

**required**

- code
- message
- level

## Subject

### Properties

**reference** string

**description**

The Subject object is used to identify the individual using identification details.

The "reference" String is expected to contain details that are used to match an individual in Watson Care Manager.

The string is parsed to extract query parameters and associated values.  
It can contain a combination of

(1) WCM Individual ID (i.e. WCM Reference Number), (2) WCM Identification External System Reference and Identification number, (3) WCM Identification Type and Identification number, (4) WCM Identification External System Reference and Identification number and birthDate, (5) WCM Identification Type and Identification number and birthDate.

For example:

(1) WCM Individual ID

```
"subject": {
    "reference" : "patient/123"
}
```

(2) WCM Identification External System Reference and Identification number

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239"}
```

(3) WCM Identification External System Reference and Identification number,

```
"subject":{  
    "reference" : "patient/identifier=Passport, identifiervalue=239" }
```

(4) WCM Identification External System Reference and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239,  
    birthDate=19380821" }
```

(5) WCM Identification Type and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=Passport, identifiervalue=239,  
    birthDate=19380821" }
```

**maxLength** 150

**type** object

**array** reference

## (Demographics) Identification API

Version:v1

By using the protected APIs that follow, you can send identification updates for a client from an external system to Watson Care Manager so that Watson Care Manager accurately reflects the external system data. The client is identified when Watson Care Manager receives the WCM client ID or the external ID and type (with or without the client's date of birth). The client's identification record is identified when Watson Care Manager receives an identifier type and record id for each identification.

### Servers

<https://host/Rest>

API methods: Create an identification

## POST /v1/ees/individual\_identifications

Create an identification record for a client who is registered in Watson Care Manager.

Create a client's identification record based on an event in the external system that initiates a transfer of valid data to Watson Care Manager.

### Example request

CURL

```
curl -X POST "https://host:port/Rest/v1/ees/individual_identifications" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Content-Type: application/json" -d "{ \"resourceType\": \"Identification\", \"value\": 69365799, \"source\": { \"text\": \"string\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"XWZS\" } ] }, \"originalSource\": { \"text\": \"string\", \"coding\": [ { \"system\": \"http://wcm/originalsource\", \"code\": \"OSSXWZ\" } ] }, \"type\": { \"coding\": [ { \"system\": \"http://wcm/identification\", \"code\": \"IDESR\" } ] }, \"identifier\": [ { \"value\": 698368, \"type\": { \"text\": \"ExtSys1\" } }, \"period\": { \"start\": \"2019-01-14\", \"end\": \"\" }, \"subject\": { \"reference\": \"patient/identifiercode=xwz, identifiervalue=239\" } } }
```

JAVA

```
HttpResponse response = Unirest.post("https://host:port/Rest/v1/ees/individual_identifications")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
    .header("Content-Type", "application/json")
    .body("{ \"resourceType\": \"Identification\", \"value\": 69365799, \"source\": { \"text\": \"string\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"XWZS\" } ] }, \"originalSource\": { \"text\": \"string\", \"coding\": [ { \"system\": \"http://wcm/originalsource\", \"code\": \"OSSXWZ\" } ] }, \"type\": { \"coding\": [ { \"system\": \"http://wcm/identification\", \"code\": \"IDESR\" } ] }, \"identifier\": [ { \"value\": 698368, \"type\": { \"text\": \"ExtSys1\" } }, \"period\": { \"start\": \"2019-01-14\", \"end\": \"\" }, \"subject\": { \"reference\": \"patient/identifiercode=xwz, identifiervalue=239\" } } }")
    .asString();
```

## Parameters

**Referer**(*header*)

**type** string

**array** curam://foundational.app

**required**true

**X-WCM-TENANT-ID**(*header*)

**type** string

**array** The tenant ID.

**required**true

**X-WCM-TENANT-INSTANCE**(*header*)

**type** string

**array** The tenant instance.

**required**true

**Authorization**(*header*)

**type** string

**array** The Access Token.

**required**true

**X-GRANT-TYPE**(*header*)

**type** string

**array** client\_credentials

**required**true

## Request body

The inbound message that contains the information required to create a client identification record.

**Required:**true

**Media types**

**application/json****Schema** [IdentificationCr](#)

*(on page*  
663)

**Responses****201**

The post request was successful.

**Headers**

Name	Description	Schema
Location	The location of the new resource.	<b>type</b> string

**400**

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible errors message: EESERR161 - There are no matching individuals based on the ID entered. EESERR165 - The individual ID value provided, ..., is invalid and not in the correct format. EESERR180 - The identification details provided match multiple clients. EESERR182 - The date value provided, ..., is invalid and not in the correct format. EESERR183 - The date value provided, ..., is invalid. EESERR193 - A valid reference number or 'identifier' and 'identifierValue' or 'identifiercode' and 'identifierValue' must be provided. EESERR628 - External system reference value provided for patient identifier code matches no record. EESERR646 - Failed to map values provided to WCM identification type. EESERR615 - Expected resourceType is Identification. EESERR513 - An Identification External System Reference 'code' is mandatory for patient Identifier. EESERR514 - Only 1 coding object can be provided for patient Identifier. EESERR515 - Only wcm system is supported for patient Identifier codes. EESERR516 - A 'value' must be provided if patient Identifier is provided. EESERR517 - The 'value' for patient Identifier must not exceed 18 characters. EESERR603 - The 'code' for patient Identifier must not exceed 20 characters. EESERR504 - A subject reference must be provided. EESERR635 - Failed to create a record. EESERR651 - Failed to create a record: ... EESERR357 - Values for identifier text and identifier value must be provided if identifier is provided. EESERR358 - Max number of identifiers to be provided per record is 3. EESERR350 - Identifiers for a client's record of the same type must be unique. EESERR353 - Identifier ... - ... matches multiple ContactPoint records for this person. EESERR354 - Resource id and identifier(s) match different ContactPoint

records for this person. EESERR352 - ContactPoint record with identifier ... - ... already exists for this person. EESERR359 - Resource ... is locked by another process. EESERR355 - Concurrent processing, please retry. EESERR636 - Failed to retrieve case ID for the patient. EESERR649 - Error: .... EESERR650 - Error: .... EESERR481 - Period start date must be before today's date. EESERR482 - Period end date must be after start date. EESERR483 - Period start date must be provided if end is provided. EESERR484 - Period start date must be after patient's birth date. EESERR616 - A valid reference for a source system must be provided.

EESERR617 - A valid reference for an original source system must be provided.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 670)*

**401**

Invalid authentication credentials for the target resource entered.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 670)*

**500**

An internal server error occurred. Contact your administrator for more information.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 670)*

**default**

An unexpected error occurred. Check the error message for more information.

**Media types**

**application/json**

**Schema DefaultErrorModel**  
*(on page 670)*

## API methods: Update an identification

### PUT /v1/ees/individual\_identifications

Update an identification record for a client who is registered in Watson Care Manager.

Updates a client's identification record assuming that a matching record is found when the external system initiates a transfer of valid data to Watson Care Manager. Watson Care Manager identifies the record to be updated based on the external identifiers that the external system provides in the body. If no matching identification record is found, Watson Care Manager creates a new identification record for the individual.

#### Example request

##### CURL

```
curl -X PUT "https://host:port/Rest/v1/ees/individual_identifications" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Content-Type: application/json" -d "{\"resourceType\": \"Identification\", \"value\": 69365799, \"source\": { \"text\": \"string\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"XWZS\" } ] }, \"originalSource\": { \"text\": \"string\", \"coding\": [ { \"system\": \"http://wcm/originalsource\", \"code\": \"OSSXWZ\" } ] }, \"type\": { \"coding\": [ { \"system\": \"http://wcm/identification\", \"code\": \"IDESR\" } ] }, \"identifier\": [ { \"value\": 698368, \"type\": { \"text\": \"ExtSys1\" } }, { \"period\": { \"start\": \"2019-01-14\", \"end\": \"\" }, \"subject\": { \"reference\": \"patient/identifiercode=xwz, identifiervalue=239\" } } ] }
```

##### JAVA

```
HttpResponse response = Unirest.put("https://host:port/Rest/v1/ees/individual_identifications")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
```

```

.header("Content-Type", "application/json")

.body("{ \"resourceType\": \"Identification\", \"value\": 69365799, \"source\": { \"text\": \"string\", \"coding\": [
{ \"system\": \"http://wcm/source\", \"code\": \"XWZS\" } ] }, \"originalSource\": { \"text\": \"string\", \"coding\": [
{ \"system\": \"http://wcm/originalsource\", \"code\": \"OSSXWZ\" } ] }, \"type\": { \"coding\": [
{ \"system\": \"http://wcm/identification\", \"IDESR\": \"string\" } ] }, \"identifier\": [ { \"value\": 698368,
\"type\": { \"text\": \"ExtSys1\" } }, { \"start\": \"2019-01-14\", \"end\": \"\" }, { \"subject\": {
\"reference\": \"patient/identifiercode=xwz, identifiervalue=239\" } } ] }

.asString();

```

## Parameters

### **Referer(header)**

**type** string

**array** curam://foundational.app

**required** true

### **X-WCM-TENANT-ID(header)**

**type** string

**array** The tenant ID.

**required** true

### **X-WCM-TENANT-INSTANCE(header)**

**type** string

**array** The tenant instance.

**required** true

### **Authorization(header)**

**type** string

**array** The Access Token.

**required** true

### **X-GRANT-TYPE(header)**

**type** string

**array** client\_credentials

**required** true

## Request body

The inbound message that contains the information required to update a client identification record.

**Required:**true

### Media types

**application/json**

**Schema** [ModifiedIdentificationCr](#)

(*on page 671*)

## Responses

### 200

The put request was successful.

### Media types

**application/json**

**Schema** [ModifiedIdentification](#)

(*on page 673*)

### 400

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error messages: EESERR161 - There are no matching individuals based on the ID entered. EESERR165 - The individual ID value provided, ..., is invalid and not in the correct format. EESERR180 - The identification details provided match multiple clients. EESERR182 - The date value provided, ..., is invalid and not in the correct format. EESERR183 - The date value provided, ..., is invalid. EESERR193 - A valid reference number or 'identifier' and 'identifierValue' or 'identifiercode' and 'identifierValue' must be provided. EESERR628 - External system reference value provided for patient identifier code matches no record. EESERR632 - Patient Identifier 'use' can't be updated with a value different from the existing one. EESERR646 - Failed to map values provided to WCM identification type. EESERR615 - Expected resourceType is Identification. EESERR513 - An Identification External System Reference 'code' is mandatory

for patient Identifier. EESERR514 - Only 1 coding object can be provided for patient Identifier. EESERR515 - Only wcm system is supported for patient Identifier codes. EESERR516 - A 'value' must be provided if patient Identifier is provided. EESERR517 - The 'value' for patient Identifier must not exceed 18 characters. EESERR504 - A subject reference must be provided. EESERR603 - The 'code' for patient Identifier must not exceed 20 characters.

EESERR357 - Values for identifier text and identifier value must be provided if identifier is provided. EESERR358 - Max number of identifiers to be provided per record is 3. EESERR350 - Identifiers for a client's record of the same type must be unique. EESERR353 - Identifier ... - ... matches multiple Identification records for this person. EESERR354 - Resource id and identifier(s) match different Identification records for this person. EESERR623 - The record was updated by a Care manager, so it can't be updated by an external system. EESERR637 - Failed to update a record. EESERR652 - Failed to update a record: ... EESERR351 - The resource id provided doesn't exist for a Identification record for this person. EESERR625 - The record was deleted by a Care manager, so it can't be reactivated by an external system. EESERR648 - Error reading the existing record . EESERR359 - Resource ... is locked by another process. EESERR355 - Concurrent processing, please retry. EESERR636 - Failed to retrieve case ID for the patient. EESERR647 - Error reading the existing record . EESERR649 - Error: .... EESERR650 - Error: .... EESERR626 - The record doesn't exist. EESERR356 - Resource ... doesn't exist. EESERR481 - Period start date must be before today's date. EESERR482 - Period end date must be after start date. EESERR483 - Period start date must be provided if end is provided. EESERR484 - Period start date must be after patient's birth date. EESERR616 - A valid reference for a source system must be provided.

EESERR617 - A valid reference for an original source system must be provided.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

(*on page 670*)

#### 401

Invalid authentication credentials for the target resource entered.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)  
*(on page 670)*

## 500

An internal server error occurred. Contact your administrator for more information.

### Media types

**application/json**

**Schema** [DefaultErrorModel](#)  
*(on page 670)*

## default

An unexpected error occurred. Check the error message for further information

### Media types

**application/json**

**Schema** [DefaultErrorModel](#)  
*(on page 670)*

## API methods: Update an identification (by ID)

### PUT /v1/ees/individual\_identifications/{id}

Update an identification record for a client who is registered in Watson Care Manager.

Updates a client's identification record assuming that a matching record is found when the external system initiates a transfer of valid data to Watson Care Manager. Watson Care Manager identifies the record to be updated based on the resource ID that the external system provides in the path and body.

### Example request

cURL

```
curl -X PUT "https://host:port/Rest/v1/ees/individual_identifications/12345678910" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Content-Type: application/json" -d "{ \"resourceType\": \"Identification\", \"id\": \"3333333\", \"value\": 69365799, \"source\": { \"text\": \"string\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"XWZS\" } ] }, \"originalSource\": }
```

```
{
  \"text\": \"string\",
  \"coding\": [
    {
      \"system\": \"http://wcm/originalsource\",
      \"code\": \"OSSXWZ\"
    }
  ],
  \"type\": {
    \"coding\": [
      {
        \"system\": \"http://wcm/identification\",
        \"code\": \"IDESR\"
      }
    ],
    \"identifier\": [
      {
        \"value\": 698368,
        \"type\": {
          \"text\": \"ExtSystl\"
        }
      }
    ],
    \"period\": {
      \"start\": \"2019-01-14\",
      \"end\": \"\"
    },
    \"subject\": {
      \"reference\": \"patient/identifiercode=xwz, identifiervalue=239\"
    }
  }
}
```

JAVA

```
HttpResponse response = Unirest.put("https://host:port/Rest/v1/ees/individual_identifications/456745")
  .header("accept", "application/json")
  .header("Authorization", "access_token")
  .header("X-GRANT-TYPE", "client_credentials")
  .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
  .header("X-WCM-TENANT-ID", "Tenant ID")
  .header("Referer", "curam://foundational.app")
  .header("Content-Type", "application/json")
  .body("{\"resourceType\": \"Identification\", \"id\": \"3333333\", \"value\": 69365799, \"source\": { \"text\": \"string\",
  \"coding\": [
    {
      \"system\": \"http://wcm/source\",
      \"code\": \"XWZS\"
    }
  ],
  \"originalSource\": {
    \"text\": \"string\",
    \"coding\": [
      {
        \"system\": \"http://wcm/originalsource\",
        \"code\": \"OSSXWZ\"
      }
    ]
  }
},
\"type\": {
    \"coding\": [
      {
        \"system\": \"http://wcm/identification\",
        \"code\": \"IDESR\"
      }
    ],
    \"identifier\": [
      {
        \"value\": 698368,
        \"type\": {
          \"text\": \"ExtSystl\"
        }
      }
    ],
    \"period\": {
      \"start\": \"2019-01-14\",
      \"end\": \"\"
    },
    \"subject\": {
      \"reference\": \"patient/identifiercode=xwz, identifiervalue=239\"
    }
  }
}")
  .asString();
```

## Parameters

### **Referer(header)**

**type** string

**array** curam://foundational.app

**required** true

### **X-WCM-TENANT-ID(header)**

**type** string

**array** The tenant ID.

**required** true

**X-WCM-TENANT-INSTANCE(*header*)****type** string**array** The tenant instance.**required** true**Authorization(*header*)****type** string**array** The Access Token.**required** true**X-GRANT-TYPE(*header*)****type** string**array** client\_credentials**required** true***id*(*path*)**

Mandatory.

The "id" attribute stores the Identification resource ID.

**type** string**maxLength** 64**required** true**Request body**

The inbound message that contains the information required to update a client identification record.

**Required:**true**Media types****application/json****Schema** [ModifiedIdentification](#)*(on page 673)*

## Responses

### 200

The put request was successful.

#### Media types

**application/json**

**Schema ModifiedIdentification**

(*on page 673*)

### 400

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error messages: EESERR161 - There are no matching individuals based on the ID entered. EESERR165 - The individual ID value provided, ..., is invalid and not in the correct format. EESERR180 - The identification details provided match multiple clients. EESERR182 - The date value provided, ..., is invalid and not in the correct format. EESERR183 - The date value provided, ..., is invalid. EESERR193 - A valid reference number or 'identifier' and 'identifierValue' or 'identifierCode' and 'identifierValue' must be provided. EESERR628 - External system reference value provided for patient identifier code matches no record. EESERR632 - Patient Identifier 'use' can't be updated with a value different from the existing one. EESERR646 - Failed to map values provided to WCM identification type. EESERR615 - Expected resourceType is Identification. EESERR513 - An Identification External System Reference 'code' is mandatory for patient Identifier. EESERR514 - Only 1 coding object can be provided for patient Identifier. EESERR515 - Only wcm system is supported for patient Identifier codes. EESERR516 - A 'value' must be provided if patient Identifier is provided. EESERR517 - The 'value' for patient Identifier must not exceed 18 characters. EESERR504 - A subject reference must be provided. EESERR603 - The 'code' for patient Identifier must not exceed 20 characters.

EESERR357 - Values for identifier text and identifier value must be provided if an identifier is provided. EESERR358 - Max number of identifiers to be provided per record is 3. EESERR350 - Identifiers for a client's record of the same type must be unique. EESERR353 - Identifier ... - ... matches multiple Identification records for this person. EESERR354 - Resource id and identifier(s) match different Identification records for this person. EESERR623 - The record was updated by a Care manager, so it can't be updated by an external system. EESERR637 - Failed to update a record. EESERR652 - Failed to update a record: ... EESERR351 - The resource id provided doesn't exist for a Identification record for this person. EESERR625 - The record

was deleted by a Care manager, so it can't be reactivated by an external system. EESERR648  
- Error reading the existing record . EESERR359 - Resource ... is locked by another process.  
EESERR355 - Concurrent processing, please retry. EESERR636 - Failed to retrieve case ID for  
the patient. EESERR647 - Error reading the existing record . EESERR649 - Error: ... . EESERR650  
- Error: .... EESERR626 - The record doesn't exist. EESERR356 - Resource ... doesn't exist.  
EESERR481 - Period start date must be before today's date. EESERR482 - Period end date  
must be after start date. EESERR483 - Period start date must be provide if end is provided.  
EESERR484 - Period start date must be after patient's birth date. EESERR616 - A valid reference  
for a source system must be provided.  
EESERR617 - A valid reference for an original source system must be provided.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 670)*

## 401

Invalid authentication credentials for the target resource entered.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 670)*

## 500

An internal server error occurred. Contact your administrator for more information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 670)*

## default

An unexpected error occurred. Check the error message for more information.

#### Media types

**application/json****Schema** DefaultModelError*(on page 670)*

## API methods: Delete an identification

### DELETE /v1/ees/individual\_identifications/{id}

Delete an identification record for a client who is registered in Watson Care Manager.

Deletes a client's identification based on a delete event in the external system that initiates a transfer of information to Watson Care Manager. Watson Care Manager identifies the record to be deleted based on the resource ID that the external system provides.

#### Example request

cURL

```
curl -X DELETE "https://host:port/Rest/v1/ees/individual_identifications/8675876" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials"
```

JAVA

```
HttpResponse response = Unirest.delete("https://host:port/Rest/v1/ees/individual_identifications/8675876")

.header("accept", "application/json")
.header("Authorization", "access_token")
.header("X-GRANT-TYPE", "client_credentials")
.header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
.header("X-WCM-TENANT-ID", "Tenant ID")
.header("Referer", "curam://foundational.app")
.asString();
```

## Parameters

**Referer(header)**

**type** string  
**array** curam://foundational.app

**required** true

**X-WCM-TENANT-ID**(*header*)

**type** string  
**array** The tenant ID.

**required** true

**X-WCM-TENANT-INSTANCE**(*header*)

**type** string  
**array** The tenant instance.

**required** true

**Authorization**(*header*)

**type** string  
**array** The Access Token.

**required** true

**X-GRANT-TYPE**(*header*)

**type** string  
**array** client\_credentials

**required** true

**id**(*path*)

Mandatory.

The "id" attribute stores the Identification resource ID to be deleted.

**type** string  
**maxLength** 64  
**required** true

## Responses

### 204

The delete request was successful.

### 400

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

EESERR624 - The record was updated by a Care Manager, so it can't be deleted by an external system. EESERR638 - Failed to delete a record. EESERR653 - Failed to delete a record: .... .  
EESERR359 - Resource ... is locked by another process. EESERR355 - Concurrent processing, please retry. EESERR636 - Failed to retrieve case ID for the patient. EESERR647 - Error reading the existing record . EESERR649 - Error: .... . EESERR650 - Error: .... . EESERR626 - The record doesn't exist. EESERR356 - Resource ... doesn't exist.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 670)*

### 500

An internal server error occurred. Contact your administrator for more information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 670)*

### default

An unexpected error occurred. Check the error message for more information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 670)*

## Components

### Schemas

#### **IdentificationCr**

##### Properties

**resourceType** string

**description**

Mandatory.

The expected resource type for Identifications API is "Identification". Any other value will be rejected.

**array** Identification

**value** string

**description**

Mandatory.

The identification value corresponds to the Identification number in Watson Care Manager.

**maxLength** 18

**example** 69365799

**source** \$ref [CodeableConceptSource](#)

(on page 668)

**originalSource** \$ref [CodeableConceptOriginalSource](#)

(on page 669)

**type** \$ref [CodeableConceptPI](#)

(on page 667)

**identifier** array

**description**

Optional.

The Identifier list of objects stores values of external identifiers for the enclosing record.

Identifier objects can be used to create and update records.

An external system can provide up to 3 identifiers for a record.

When a record is created with an external identifier, the same identifier provided can be used to identify a record. Therefore send a PUT request to update the record.

For Example: An Identification record is created providing an identifier with the following values: identifier.type.text = "ExtSys1" identifier.value = "698368" A PUT request with an updated content and identifier as follows: identifier.type.text = "ExtSys1" identifier.value = "698368" can be sent using the following url: /Rest/v1/ees/individual\_identifications The Identification record is updated.

<b>maxItems</b>	3
<b>items</b>	\$ref Identifier <i>(on page 665)</i>
<b>period</b>	\$ref Period <i>(on page 664)</i>
<b>subject</b>	\$ref Subject <i>(on page 665)</i>
<b>type</b>	object
<b>required</b>	<ul style="list-style-type: none"> <li>• resourceType</li> <li>• value</li> <li>• type</li> <li>• subject</li> <li>• source</li> </ul>

## Period

### Properties

**start** string(*date*)

**description**

Optional.

The start date of the record. The expected format is yyyy-MM-dd.

**end** string(*date*)

**description**

Optional.

The end date of the record. If provided, the start date must also be provided. The expected format is yyyy-MM-dd.

**type** object

## Identifier

### Properties

**value** string

**description**

Optional.

This attribute stores the external identifier value. If provided, a type.text value must be provided.

**maxLength** 100

**example** 698368

**type** \$ref [CodeableConcept](#)

(*on page 667*)

**type** object

## Subject

### Properties

**reference** string

**description**

The Subject object is used to identify an individual in Watson Care Manager.

The "reference" String is expected to contain identifier details that will be used to match an individual in Watson Care Manager.

The string is parsed to extract query parameters and associated values.

It can contain a combination of

(1) WCM Patient ID (i.e. WCM Reference Number), (2) WCM Identification External System Reference and Identification number, (3) WCM Identification Type and Identification number, (4) WCM Identification External System Reference and Identification number and birthDate, (5) WCM Identification Type and Identification number and birthDate.

For example:

(1) WCM Patient ID

```
"subject":{  
    "reference" : "patient/123      " }
```

(2) WCM Identification External System Reference and Identification number

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239"}
```

(3) WCM Identification External System Reference and Identification number,

```
"subject":{  
    "reference" : "patient/identifier=Passport, identifiervalue=239" }
```

(4) WCM Identification External System Reference and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239,  
    birthDate=19380821" }
```

(5) WCM Identification Type and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=Passport, identifiervalue=239,  
    birthDate=19380821" }
```

**maxLength** 150

**example** patient/identifiercode=xwz, identifiervalue=239

**type** object**array** reference

## CodeableConcept

### Properties

**text** string**description**

Optional.

This attribute stores the value for the identifier type. It must be provided if an identifier value is provided.

**maxLength** 100**example** ExtSys1**type** object

## CodeableConceptPI

### Properties

**coding** array**maxItems** 1**description**

Mandatory.

The Coding object stores the details of the Identification type to be created for an Individual. Must be provided if an Identification value is provided. 1 Coding per Identification can be provided.

**items** \$ref [CodingPI](#)

*(on page  
667)*

**type** object**array** coding

## CodingPI

### Properties

**system** string

**description**

Optional.

If provided, it must be "http://wcm/identification".

**array** http://wcm/identification

**code** string

**description**

Mandatory.

This value stores the Identification External System reference that the Watson Care Manager Admin user configured for an Identification Type.

**maxLength** 20

**example** IDESR

**type** object

**array** code

## CodeableConceptSource

### Properties

**text** string

**description**

Optional

Textual description of codeable concept.

**coding** array

**maxItems** 1

**items** \$ref CodingSource

(on page

669)

**type** object

**array** coding

## CodingSource

### Properties

**system** string

**description**  
Required.

"http://wcm/source" for source.

**array** http://wcm/source

**code** string

**description**  
Required. The "code" value  
describes the source system.  
The value provided maps to  
Watson Care Manager Source  
System

**maxLength** 20

**example** XWZS

**type** object

**array** code

## CodeableConceptOriginalSource

### Properties

**text** string

**description**  
Optional

Textual description of codeable concept.

**coding** array

**maxItems** 1

**items** \$ref CodingOriginalSource  
*(on page 670)*

**type** object

## CodingOriginalSource

### Properties

**system** string

**description**

Optional. If provided, must be "http://wcm/originalsource" for original source.

**array**

http://wcm/originalsource

**code** string

**description**

Required. The "code" value describes the original source system. The value provided maps to Watson Care Manager Original Source System

**maxLength** 20

**example** OSSXWZ

**type** object

**array** code

## DefaultModelError

### Properties

**Error** array

**items \$ref** Error (*on*

*page*

*670*)

**type** object

## Error

### Properties

**code** integer(*int32*)

**description**

A machine-readable code that identifies the problem. This will not vary with the Accept-Language setting

**message** string

**description**

A human-readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text may change over time.

**level** string

**description**

The level of the error.

**type** object

**required**

- code
- message
- level

**ModifiedIdentificationCr****Properties**

**resourceType** string

**description**

Mandatory.

The expected resource type for Identifications API is "Identification". Any other value is rejected.

**array** Identification

**value** string

**description**

Mandatory.

The identification value corresponds to the Identification number in Watson Care Manager.

**maxLength** 18

**example** 69365799

**source** \$ref [CodeableConceptSource](#)

(on page 668)

**originalSource** \$ref [CodeableConceptOriginalSource](#)

(on page 669)

<b>type</b>	\$ref <a href="#">ModifiedCodeableConceptPI</a> <i>(on page 675)</i>
<b>identifier</b>	array
	<b>maxItems</b> 3
	<b>description</b> Optional.
	The Identifier list of objects stores values of external identifiers for the enclosing record.
	Identifier objects can be used to create and update records.
	An external system can create record identifiers when creating or updating a record. An external system can provide up to 3 identifiers for a record, for each REST call.
	An individual's record can be identified using external identifiers.
	When invoking this PUT API, if identifiers provided match an Identification record for this individual, the record is updated. If no record is matched, a new Identification record is created.
	For Example: An Identification record that was created providing this identifier: identifier.type.text = "ExtSys1" identifier.value = "698368" can then be updated invoking this API and providing the same identifier.
<b>items</b>	\$ref <a href="#">Identifier</a> <i>(on page 665)</i>
<b>period</b>	\$ref <a href="#">Period</a> <i>(on page 664)</i>
<b>subject</b>	\$ref <a href="#">Subject</a> <i>(on page 665)</i>
<b>type</b>	object

**required**

- resourceType
- value
- subject
- source

**ModifiedIdentification****Properties****resourceType** string**description**

Mandatory.

The expected resource type for Identifications API is "Identification".  
Any other value is rejected.

**array** Identification**id** string**description**

Mandatory.

The "id" attribute stores the Identification resource ID.

**maxLength** 64**example** 3333333**value** string**description**

Mandatory.

The identification value corresponds to the Identification number in Watson Care Manager.

**maxLength** 18**example** 69365799**source** \$ref [CodeableConceptSource](#)

(on page 668)

**originalSource** \$ref [CodeableConceptOriginalSource](#)

(on page 669)

<b>type</b>	\$ref <a href="#">ModifiedCodeableConceptPI</a> <i>(on page 675)</i>
<b>identifier</b>	array
	<b>maxItems</b> 3
	<b>description</b> Optional.
	The Identifier list of objects stores values of external identifiers for the enclosing record.
	Identifier objects can be used to create and update records.
	An external system can create record identifiers when creating or updating a record. An external system can provide up to 3 identifiers for a record, for each REST call.
	An individual's record can be identified using external identifiers.
	When invoking this PUT API, identifiers are evaluated before they are added to the record to be updated:
	<ul style="list-style-type: none"> <li>• If no other Identification record exists with any of these identifiers for this individual, the identifiers are added to this record in WCM.</li> <li>• If another Identification record already exist in WCM for this individual with one of the identifiers provided, the request fails.</li> <li>• If identifiers already exist for a Identification record for this individual and the resource ID provided is the one of the Identification record, the update is successful.</li> </ul>
<b>items</b>	\$ref <a href="#">Identifier</a> <i>(on page 665)</i>
<b>period</b>	\$ref <a href="#">Period</a> <i>(on page 664)</i>

**subject**      [\\$ref Subject](#)  
                   *(on page 665)*

**type** object

**required**

- resourceType
- id
- value
- subject
- source

## ModifiedCodeableConceptPI

**Properties**

**coding** array

**maxItems** 1

**description** Optional.

The Coding object stores the details of the Identification type. 1 Coding per Identification can be provided.

**items**      [\\$ref ModifiedCodingPI](#)  
                   *(on page 675)*

**type** object

## ModifiedCodingPI

**Properties**

**system** string

**description** Optional. If provided, it must be "http://wcm/identification".

**array**      http://wcm/identification

**code** string

**description** Optional.

This value stores the Identification External System reference that the Watson Care Manager Admin user configured for an Identification Type.

In Watson Care Manager an Identification Type can't be updated.

On a PUT request, if the "code" is not provided, the existing Identification type is used for the update. If the "code" is provided and matches a different Identification Type, the update request fails.

**maxLength** 20

**example** IDESR

**type** object

## (Demographics) Name API

Version:v1

By using the protected APIs that follow, you can send name updates for a client from an external system to Watson Care Manager so that Watson Care Manager accurately reflects the external system data. The API sends Watson Care Manager updates for a client's first, middle, and last name, and suffix. The client is identified when Watson Care Manager receives the WCM client ID or the external ID and type (with or without the client's date of birth). The client's name record is identified when Watson Care Manager receives an identifier type and record id.

### Servers

`https://host/Rest`

#### API methods: Create a name

**POST /v1/ees/individual\_names**

Create a name record for a client who is registered in Watson Care Manager.

Creates a client name record based on an event in the external system that initiates a transfer of valid data to Watson Care Manager.

## Example request

cURL

```
curl -X POST "https://host:port/Rest/v1/ees/individual_names" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Content-Type: application/json" -d "{ \"use\": \"old\", \"family\": \"Smith\", \"given\": \"John\", \"prefix\": \"Mr\", \"suffix\": \"Junior\", \"middle\": \"Walter\", \"resourceType\": \"HumanName\", \"source\": \"Hospital\", \"originalSource\": \"Doctor\", \"identifier\": [ { \"value\": \"765\", \"type\": { \"text\": \"System 1\" } } ], \"subject\": { \"reference\": \"patient/123\" } }
```

JAVA

```
HttpResponse response = Unirest.post("https://host:port/Rest/v1/ees/individual_names")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
    .header("Content-Type", "application/json")
    .body("{ \"use\": \"old\", \"family\": \"Smith\", \"given\": \"John\", \"prefix\": \"Mr\", \"suffix\": \"Junior\", \"middle\": \"Walter\", \"resourceType\": \"HumanName\", \"source\": \"Hospital\", \"originalSource\": \"Doctor\", \"identifier\": [ { \"value\": \"765\", \"type\": { \"text\": \"System 1\" } } ], \"subject\": { \"reference\": \"patient/123\" } }")
    .asString();
```

## Parameters

**Referer(header)**

**type** string

**array** curam://foundational.app

**required** true

**X-WCM-TENANT-ID(header)**

**type** string

**array** The tenant ID.

**required** true

#### X-WCM-TENANT-INSTANCE(header)

**type** string

**array** The tenant instance.

**required** true

#### Authorization(header)

**type** string

**array** The Access Token.

**required** true

#### X-GRANT-TYPE(header)

**type** string

**array** client\_credentials

**required** true

## Request body

The inbound message that contains the information required to create a client name record.

**Required:**true

### Media types

application/json

**Schema** [NewHumanNameCr](#)

(*on page 698*)

## Responses

**201**

The post request was successful.

## Headers

Name	Description	Schema
Location	The location of the new resource.	<b>type</b> string

## 400

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

Possible errors message: EESERR161 - There are no matching individuals based on the ID entered. EESERR165 - The individual ID value provided, ..., is invalid and not in the correct format. EESERR180 - The identification details provided match multiple clients. EESERR182 - The date value provided, ..., is invalid and not in the correct format. EESERR183 - The date value provided, ..., is invalid. EESERR193 - A valid reference number or 'identifier' and 'identifierValue' or 'identifiercode' and 'identifierValue' must be provided. EESERR614 - Expected resourceType is HumanName. EESERR620 - An 'official' name record already exists. EESERR621 - A 'usual' name record already exists. EESERR639 - Failed to map values provided to WCM name type. EESERR629 - External system reference value provided for name suffix matches no record. EESERR630 - External system reference value provided for name prefix matches no record. EESERR504 - A subject reference must be provided. EESERR496 - Values must be provided for 'family', 'given' and 'use' name's attributes. EESERR500 - Invalid 'use' value provided for name. EESERR635 - Failed to create a record. EESERR651 - Failed to create a record: ... EESERR357 - Values for identifier text and identifier value must be provided if identifier is provided. EESERR358 - Max number of identifiers to be provided per record is 3. EESERR350 - Identifiers for a client's record of the same type must be unique. EESERR353 - Identifier ... - ... matches multiple Name records for this person. EESERR354 - Resource id and identifier(s) match different Names records for this person. EESERR352 - Name record with identifier ... - ... already exists for this person. EESERR359 - Resource ... is locked by another process. EESERR355 - Concurrent processing, please retry. EESERR636 - Failed to retrieve case ID for the patient. EESERR649 - Error: ... . EESERR650 - Error: ... .

## Media types

**application/json**

**Schema** [DefaultModelError](#)

(on page 707)

## 401

Invalid authentication credentials for the target resource entered.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 707](#))

**500**

An internal server error occurred. Contact your administrator for more information.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 707](#))

**default**

An unexpected error occurred. Check the error message for more information.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 707](#))

## API methods: Update a name

**PUT /v1/ees/individual\_names**

Update a name record for a client who is registered in Watson Care Manager.

Updates a client's name assuming that a matching record is found when the external system initiates a transfer of valid data to Watson Care Manager. Watson Care Manager identifies the record to be updated based on the external identifiers that the external system provides in the body. If no matching name record is found, Watson Care Manager creates a new name record for the individual.

**Example request**

## CURL

```
curl -X PUT "https://host:port/Rest/v1/ees/individual_names" -H "X-WCM-TENANT-ID: Tenant ID" -H
"X-WCM-TENANT-INSTANCE: Tenant Instance" -H "accept: application/json" -H "Referer: curam://foundational.app" -H
"Content-Type: application/json" -d "{ \"use\": \"old\", \"family\": \"Smith\", \"given\": \"John\", \"prefix\": \"Mr\",
\"suffix\": \"Junior\", \"middle\": \"Walter\", \"resourceType\": \"HumanName\", \"source\": \"Hospital\",
\"originalSource\": \"Doctor\", \"identifier\": [ { \"value\": \"765\", \"type\": { \"text\": \"System 1\" } } ],
\"subject\": { \"reference\": \"patient/123\" } }"
```

## JAVA

```
HttpResponse response = Unirest.put("https://host:port/Rest/v1/ees/individual_names")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
    .header("Content-Type", "application/json")
    .body("{ \"use\": \"old\", \"family\": \"Smith\", \"given\": \"John\", \"prefix\": \"Mr\", \"suffix\": \"Junior\",
\"middle\": \"Walter\", \"resourceType\": \"HumanName\", \"source\": \"Hospital\", \"originalSource\": \"Doctor\",
\"identifier\": [ { \"value\": \"765\", \"type\": { \"text\": \"System 1\" } } ],
\"subject\": { \"reference\": \"patient/123\" } }")
    .asString();
```

**Parameters****Referer(header)****type** string**array** curam://foundational.app**required** true**X-WCM-TENANT-ID(header)****type** string**array** The tenant ID.

**required** true

**X-WCM-TENANT-INSTANCE**(*header*)

**type** string

**array** The tenant instance.

**required** true

**Authorization**(*header*)

**type** string

**array** The Access Token.

**required** true

**X-GRANT-TYPE**(*header*)

**type** string

**array** client\_credentials

**required** true

## Request body

The inbound message that contains the information required to update a client name record.

**Required:**true

**Media types**

application/json

**Schema** [ModifiedHumanNameCr](#)

(*on page 701*)

## Responses

**200**

The put request was successful.

**Media types**

application/json

**Schema** [ModifiedHumanNameExt](#)*(on page 704)***400**

The data request is invalid. Check the error message for more information and resend the request with the corrected data. Possible error messages: EESERR161 - There are no matching individuals based on the ID entered. EESERR165 - The individual ID value provided, ..., is invalid and not in the correct format. EESERR180 - The identification details provided match multiple clients. EESERR182 - The date value provided, ..., is invalid and not in the correct format. EESERR183 - The date value provided, ..., is invalid. EESERR193 - A valid reference number or 'identifier' and 'identifierValue' or or 'identifiercode' and 'identifierValue' must be provided. EESERR631 - Name 'use' can't be updated with a value different from the existing one. EESERR639 - Failed to map values provided to WCM name type EESERR629 - External system reference value provided for name suffix matches no record. EESERR630 - External system reference value provided for name prefix matches no record. EESERR614 - Expected resourceType is HumanName. EESERR504 - A subject reference must be provided. EESERR496 - Values must be provided for 'family', 'given' and 'use' name's attributes. EESERR498 - Only 1 'preferred' name can be provided. EESERR499 - Only 1 'official' name can be provided. EESERR500 - Invalid 'use' value provided for name. EESERR357 - Values for identifier text and identifier value must be provided if identifier is provided. EESERR358 - Max number of identifiers to be provided per record is 3. EESERR350 - Identifiers for a client's record of the same type must be unique. EESERR353 - Identifier ... - ... matches multiple Name records for this person. EESERR354 - Resource id and identifier(s) match different Name records for this person. EESERR623 - The record was updated by a Care Manager, so it can't be updated by an external system. EESERR637 - Failed to update a record. EESERR652 - Failed to update a record: ... EESERR351 - The resource id provided doesn't exist for a %1s record for this person. EESERR625 - The record was deleted by a Care Manager, so it can't be reactivated by an external system. EESERR648 - Error reading the existing record . EESERR359 - Resource ... is locked by another process. EESERR355 - Concurrent processing, please retry. EESERR636 - Failed to retrieve case ID for the patient. EESERR647 - Error reading the existing record . EESERR649 - Error: ... . EESERR650 - Error: ... . EESERR626 - The record doesn't exist. EESERR356 - Resource ... doesn't exist.

**Media types****application/json****Schema** [DefaultModelError](#)*(on page 707)*

## 401

Invalid authentication credentials for the target resource entered.

### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 707)*

## 500

An internal server error occurred. Contact your administrator for more information.

### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 707)*

## default

An unexpected error occurred. Check the error message for more information.

### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 707)*

## API methods: Update a name (by ID)

**PUT /v1/ees/individual\_names/{id}**

Update a name record for a client who is registered in Watson Care Manager.

Updates a client's name assuming that a matching record is found when the external system initiates a transfer of valid data to Watson Care Manager. Watson Care Manager identifies the record to be updated based on the resource ID that the external system provides in the path and body.

### Example request

## CURL

```
curl -X PUT "https://host:port/Rest/v1/ees/individual_names/123" -H "X-WCM-TENANT-ID: Tenant ID" -H
"X-WCM-TENANT-INSTANCE: Tenant Instance" -H "accept: application/json" -H "Referer: curam://foundational.app" -H
"Content-Type: application/json" -d "{ \"use\": \"old\", \"id\": \"123\", \"family\": \"Smith\", \"given\": \"John\",
\"prefix\": \"Mr\", \"suffix\": \"Junior\", \"middle\": \"Walter\", \"resourceType\": \"HumanName\",
\"source\": \"Hospital\", \"originalSource\": \"Doctor\", \"identifier\": [ { \"value\": \"765\",
\"type\": { \"text\": \"System 1\" } } ], \"subject\": { \"reference\": \"patient/123\" } }"
```

## JAVA

```
HttpResponse response = Unirest.put("https://host:port/Rest/v1/ees/individual_names/123")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
    .header("Content-Type", "application/json")
    .body("{ \"use\": \"old\", \"id\": \"123\", \"family\": \"Smith\", \"given\": \"John\",
\"prefix\": \"Mr\", \"suffix\": \"Junior\", \"middle\": \"Carl\", \"resourceType\": \"HumanName\",
\"source\": \"Hospital\", \"originalSource\": \"Doctor\",
\"identifier\": [ { \"value\": \"3674873772\", \"type\": { \"text\": \"Sys3\" } } ], \"subject\": { \"reference\": \"Patient/683629\" } }")
    .asString();
```

**Parameters****Referer(header)****type** string**array** curam://foundational.app**required** true**X-WCM-TENANT-ID(header)****type** string**array** The tenant ID.

**required** true

**X-WCM-TENANT-INSTANCE(*header*)**

**type** string

**array** The tenant instance.

**required** true

**Authorization(*header*)**

**type** string

**array** The Access Token.

**required** true

**X-GRANT-TYPE(*header*)**

**type** string

**array** client\_credentials

**required** true

**id(*path*)**

Mandatory. The "id" attribute stores the Name resource ID value.

**type** string

**maxLength** 64

**required** true

## Request body

The inbound message that contains the information required to update a client name record.

**Required:**true

### Media types

application/json

**Schema** [ModifiedHumanNameExt](#)

(*on page 704*)

## Responses

### 200

The put request was successful.

#### Media types

**application/json**

**Schema** [ModifiedHumanNameExt](#)

(*on page 704*)

### 400

The data request is invalid. Check the error message for more information and resend the request with the corrected data. Possible error messages: EESERR161 - There are no matching individuals based on the ID entered. EESERR165 - The individual ID value provided, ..., is invalid and not in the correct format. EESERR180 - The identification details provided match multiple clients. EESERR182 - The date value provided, ..., is invalid and not in the correct format. EESERR183 - The date value provided, ..., is invalid. EESERR193 - A valid reference number or 'identifier' and 'identifierValue' or or 'identifiercode' and 'identifierValue' must be provided. EESERR631 - Name 'use' can't be updated with a value different from the existing one. EESERR639 - Failed to map values provided to WCM name type EESERR629 - External system reference value provided for name suffix matches no record. EESERR630 - External system reference value provided for name prefix matches no record. EESERR614 - Expected resourceType is HumanName. EESERR504 - A subject reference must be provided. EESERR496 - Values must be provided for 'family', 'given' and 'use' name's attributes. EESERR498 - Only 1 'preferred' name can be provided. EESERR499 - Only 1 'official' name can be provided. EESERR500 - Invalid 'use' value provided for name. EESERR357 - Values for identifier text and identifier value must be provided if identifier is provided. EESERR358 - Max number of identifiers to be provided per record is 3. EESERR350 - Identifiers for a client's record of the same type must be unique. EESERR353 - Identifier ... - ... matches multiple Name records for this person. EESERR354 - Resource id and identifier(s) match different Name records for this person. EESERR623 - The record was updated by a Care Manager, so it can't be updated by an external system. EESERR637 - Failed to update a record. EESERR652 - Failed to update a record: ... EESERR351 - The resource id provided doesn't exist for a %1s record for this person. EESERR625 - The record was deleted by a Care Manager, so it can't be reactivated by an external system. EESERR648 - Error reading the existing record . EESERR359 - Resource ... is locked by another process. EESERR355 - Concurrent processing, please retry. EESERR636 - Failed to retrieve case ID for the patient. EESERR647 - Error reading the existing

record . EESERR649 - Error: ... . EESERR650 - Error: ... . EESERR626 - The record doesn't exist.  
EESERR356 - Resource ... doesn't exist.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 707)*

**401**

Invalid authentication credentials for the target resource entered.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 707)*

**500**

An internal server error occurred. Contact your administrator for more information.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 707)*

**default**

An unexpected error occurred. Check the error message for more information.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 707)*

## API methods: Delete a name

## DELETE /v1/ees/individual\_names/{id}

Delete a name record for a client who is registered in Watson Care Manager.

Deletes a client's name based on a delete event in the external system that initiates a transfer of information to Watson Care Manager. WCM identifies the record to be deleted based on the resource ID that the external system provides.

### Example request

CURL

```
curl -X DELETE "https://host:port/Rest/v1/ees/individual_names/123" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "accept: application/json" -H "Referer: curam://foundational.app"
```

JAVA

```
HttpResponse response = Unirest.delete("https://host:port/Rest/v1/ees/individual_names/123")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
    .asString();
```

## Parameters

### Referer(header)

**type** string

**array** curam://foundational.app

**required** true

### X-WCM-TENANT-ID(header)

**type** string

**array** The tenant ID.

**required** true

**X-WCM-TENANT-INSTANCE(*header*)**

**type** string

**array** The tenant instance.

**required** true

**Authorization(*header*)**

**type** string

**array** The Access Token.

**required** true

**X-GRANT-TYPE(*header*)**

**type** string

**array** client\_credentials

**required** true

**id(*path*)**

Mandatory.

The "id" attribute stores the resource ID of the Name record to be deleted.

**type** string

**maxLength** 64

**required** true

## Responses

### 204

The delete request was successful.

### 400

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error messages returned: EESERR622 - The 'official' name record cannot be deleted.  
EESERR624 - The record was updated by a Care Manager, so it can't be deleted by an external system.  
EESERR638 - Failed to delete a record.  
EESERR653 - Failed to delete a record: ....  
EESERR359 - Resource ... is locked by another process.  
EESERR355 - Concurrent processing, please retry.  
EESERR636 - Failed to retrieve case ID for the patient.  
EESERR647 - Error reading the existing record .  
EESERR649 - Error: ....  
EESERR650 - Error: ....  
EESERR626 - The record doesn't exist.  
EESERR356 - Resource ... doesn't exist.

**Media types****application/json****Schema** [ModelError](#)*(on page 707)***401**

Invalid authentication credentials for the target resource entered.

**Media types****application/json****Schema** [ModelError](#)*(on page 707)***500**

An internal server error occurred. Contact your administrator for more information.

**Media types****application/json****Schema** [ModelError](#)*(on page 707)***default**

An unexpected error occurred. Check the error message for more information.

**Media types****application/json****Schema** [ModelError](#)*(on page 707)*

## Components

### Schemas

#### NewIdentifier

##### Properties

**value** string

**description**

Optional.

This attribute stores the external identifier value. If provided, a type.text value must be provided.

**maxLength** 100

**type** \$ref [NewCodeableConcept](#)

(*on page 692*)

**type** object

#### NewCodeableConcept

##### Properties

**text** string

**description**

Optional.

This attribute stores the value for the identifier type. It must be provided if an identifier value is provided.

**maxLength** 100

**type** object

#### CodeableConceptSource

##### Properties

**text** string

**description**

Optional

Textual description of codeable concept.

**coding** array

**maxItems** 1  
**items** \$ref [CodingSource](#)  
*(on page 693)*

**type** object

## CodingSource

### Properties

**system** string

**description** Required.  
 "http://wcm/source" for source.

**array** http://wcm/source  
**code** string

**description** Required. The "code" value describes the source system.  
 The value provided maps to Watson Care Manager Source System

**maxLength** 20

**type** object

**array** code

## CodeableConceptOriginalSource

### Properties

**text** string

**description** Optional

Textual description of codeable concept.

**coding** array

**maxItems** 1

**items** \$ref [CodingOriginalSource](#)  
*(on page 694)*

**type** object

## CodingOriginalSource

### Properties

**system** string

**description** Required.

"http://wcm/originalsource" for orginal source.

**array** http://wcm/originalsource

**code** string

**description** Required. The "code" value describes the original source system. The value provided maps to Watson Care Manager Original Source System

**maxLength** 20

**type** object

**array** code

## ModifiedSubject

### Properties

**reference** string

**description**

The Subject object is used to identify an individual in Watson Care Manager.

The "reference" String is expected to contain identifier details that will be used to match an individual in Watson Care Manager.

The string is parsed to extract query parameters and associated values.  
The string can contain a combination of

(1) WCM Patient ID (that is, the Watson Care Manager Reference Number), (2) WCM Identification External System Reference and Identification number, (3) WCM Identification Type and Identification number, (4) WCM Identification External System Reference and Identification number and birthDate, (5) WCM Identification Type and Identification number and birthDate.

For example:

(1) WCM Patient ID

```
"subject":{  
    "reference" : "patient/123" }
```

(2) WCM Identification External System Reference and Identification number

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239" }
```

(3) WCM Identification External System Reference and Identification number,

```
"subject":{  
    "reference" : "patient/identifier=Passport, identifiervalue=239" }
```

(4) WCM Identification External System Reference and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239,  
    birthDate=19380821" }
```

(5) WCM Identification Type and Identification number and birthDate,

```

    "subject":{

      "reference" : "patient/identifiercode=Passport, identifiervalue=239,
      birthDate=19380821"  }
  
```

**maxLength** 150

**type** object

**array** reference

## NewSubject

### Properties

**reference** string

#### description

The Subject object is used to identify an individual in Watson Care Manager.

The "reference" String is expected to contain identifier details that are used to match an individual in Watson Care Manager.

The string is parsed to extract query parameters and associated values.  
The string can contain a combination of

(1) WCM Patient ID (that is, the Watson Care Manager Reference Number), (2) WCM Identification External System Reference and Identification number, (3) WCM Identification Type and Identification number, (4) WCM Identification External System Reference and Identification number and birthDate, (5) WCM Identification Type and Identification number and birthDate.

For example:

(1) WCM Patient ID

```

    "subject":{

      "reference" : "patient/123      "
    }
  
```

(2) WCM Identification External System Reference and Identification number

```

    "subject":{

      "reference" : "patient/identifiercode=xwz, identifiervalue=239"
    }
  
```

(3) WCM Identification External System Reference and Identification number,

```
"subject":{  
    "reference" : "patient/identifier=Passport, identifiervalue=239" }
```

(4) WCM Identification External System Reference and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239,  
    birthDate=19380821" }
```

(5) WCM Identification Type and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=Passport, identifiervalue=239,  
    birthDate=19380821" }
```

**maxLength** 150

**type** object

**array** reference

## ModifiedIdentifier

### Properties

**value** string

**description**

Optional.

This attribute stores the external identifier value. If provided, a type.text value must be provided.

**maxLength** 100

**type** object

**description**

Optional. This object stores the value for the Identifier type.

**\$ref** [ModifiedCodeableConcept \(on page 698\)](#)

**type** object

## ModifiedCodeableConcept

### Properties

**text** string

**description**  
Optional.

This attribute stores the value for the Identification type. It must be provided if an identifier value is provided.

**maxLength** 100

**type** object

## NewHumanNameCr

### Properties

**resourceType** string

**description**  
Mandatory.

The expected resource type for Name API is "HumanName". Any other value is rejected.

**array** HumanName

**use** string

**description**  
Mandatory.

The "use" value describes the purpose of the name record.

Available values to be used are listed below, on the right. On the left is the corresponding WCM name Type value, which is displayed in the Client Data page when viewing the Name record:

"usual" > Preferred "official" > Registered "temp" > Temporary  
"nickname" > Alias "anonymous" > Anonymous "old" > Old "maiden"  
> Maiden

An individual who is registered in Watson Care Manager can have only 1 Registered name, which must be provided when registering a Client. A POST request for creating an "official" name record will fail.

An individual who is registered in Watson Care Manager can have only 1 Preferred name. A POST request for creating a "usual" name record will fail if the individual already has a preferred name.

**enum**

- usual
- official
- temp
- nickname
- anonymous
- old
- maiden

**family** string

**description**

Mandatory. The "family" attribute stores the value for the WCM "Last Name".

**maxLength** 65

**given** string

**description**

Mandatory.

The "given" attribute stores the value for the WCM "First Name".

**maxLength** 65

**prefix** string

**description**

Optional.

The "prefix" attribute stores the Title External System Reference that is configured by an Admin user in Watson Care Manager.

**maxLength** 20

**suffix** string

**description**

Optional.

The "suffix" attribute stores the Suffix External System Reference that is onfigured by an Admin user in Watson Care Manager.

**maxLength** 20

**middle** string

**description**

Optional.

The "middle" attribute stores the value for the WCM "Middle Name."

**maxLength** 65

**source** \$ref [CodeableConceptSource](#)

(*on page 692*)

**originalSource** \$ref [CodeableConceptOriginalSource](#)

(*on page 693*)

**identifier** array

**maxItems** 3

**description**

Optional.

The Identifier list of objects stores values of external identifiers for the enclosing record.

Identifier objects can be used to create and update records.

An external system can provide up to 3 identifiers for a record.

When a record is created with an external identifier, the same identifier that is provided can be used to identify a record. Hence send a PUT request to update the record.

For Example: A name record is created, which provides an identifier with the following values: identifier.type.text = "ExtSys1" identifier.value = "698368" A PUT request with an updated content and identifier as follows: identifier.type.text = "ExtSys1" identifier.value = "698368" can be sent using the following url: / Rest/v1/ees/individual\_names The name record is updated.

<b>items</b>	\$ref <a href="#">NewIdentifier</a> (on page 692)
<b>subject</b>	\$ref <a href="#">NewSubject</a> (on page 696)
<b>type</b>	object
<b>required</b>	<ul style="list-style-type: none"> <li>• subject</li> <li>• resourceType</li> <li>• family</li> <li>• given</li> <li>• use</li> </ul>

## ModifiedHumanNameCr

### Properties

**resourceType** string

**description**  
Mandatory.

For Name APIs, the expected resource type is "HumanName". Any other value will fail the validation.

**array** HumanName

**use** string

**description**  
Mandatory.

The "use" value describes the purpose of the name record.

Available values to be used are listed below, on the right. On the left is the corresponding WCM name Type value, as it will be displayed in the Client Data page when viewing the Name record:

"usual" > Preferred "official" > Registered "temp" > Temporary  
"nickname" > Alias "anonymous" > Anonymous "old" > Old "maiden"  
> Maiden

A name Type cannot be updated in Watson Care Manager.

Therefore, if the 'use' value provided for a PUT request is different from the one used when creating the record, the request fails.

An individual who is registered in Watson Care Manager can have only 1 Registered name, which must be provided when registering a client. A PUT request for an "official" name that results in a Create operation will fail.

An individual who is registered in Watson Care Manager can have only 1 Preferred name. A PUT request for a "usual" name that results in a Create operation will hence fail if the individual already has a preferred name.

**enum**

- usual
- official
- temp
- nickname
- anonymous
- old
- maiden

**maxLength 900**

**family** string

**description**

Mandatory.

The "family" attribute stores the value for the WCM "Last Name".

**maxLength 65**

**given** string

**description**

Mandatory.

The "given" attribute stores the value for the WCM "First Name".

**maxLength 65**

**prefix** string

**description**

Optional.

The "prefix" attribute stores the Title External System Reference that is configured by an Admin user in Watson Care Manager.

**maxLength** 20

**suffix** string

**description**

Optional.

The "suffix" attribute stores the Suffix External System Reference that is configured by an Admin user in Watson Care Manager.

**maxLength** 20

**middle** string

**description**

Optional.

The "middle" attribute stores the value for the WCM "Middle Name".

**maxLength** 65

**source** \$ref [CodeableConceptSource](#)  
(*on page 692*)

**originalSource** \$ref [CodeableConceptOriginalSource](#)  
(*on page 693*)

**identifier** array

**description**

Optional.

The Identifier list of objects stores values of external identifiers for the enclosing record.

Identifier objects can be used to create and update records.

An external system can create record identifiers when creating or updating a record. An external system can provide up to 3 identifiers for a record, for each REST call.

An individual's record can be identified using external identifiers.

When invoking this PUT API, if identifiers provided match a name record for this individual, the record is updated. If no name record is matched, a new name record is created.

For Example: A name record that was created providing this identifier: identifier.type.text = "ExtSys1" identifier.value = "698368" can be updated by invoking this API and providing the same identifier.

**maxItems** 3

**items** \$ref [ModifiedIdentifier](#)  
*(on page 697)*

**subject** \$ref [ModifiedSubject](#)  
*(on page 694)*

**type** object

#### **required**

- subject
- resourceType
- family
- given

## ModifiedHumanNameExt

### Properties

**resourceType** string

**description**  
Mandatory.

For Name APIs, the expected resource type is "HumanName". Any other value fails the validation.

**array** HumanName

**use** string

**description**  
Optional.

The "use" value describes the purpose of the name record.

Available values to be used are listed below, on the left is the corresponding WCM name Type value, as it will be displayed in the Client Data page when viewing the Name record:

```
"usual" > Preferred "official" > Registered "temp" > Temporary  
"nickname" > Alias "anonymous" > Anonymous "old" > Old "maiden"  
> Maiden
```

If no value is provided for 'use' when invoking this API, the value of the existing record will be applied for the update.

A name Type cannot be updated in Watson Care Manager. Therefore, if the 'use' value provided for a PUT request is different from the one used when creating the record, the request fails.

**enum**

- usual
- official
- temp
- nickname
- anonymous
- old
- maiden

**family** string

**description**

Mandatory.

The "family" attribute stores the value for the WCM "Last Name".

**maxLength** 65

**given** string

**description**

Mandatory. The "given" attribute stores the value for the WCM "First Name".

**maxLength** 65

**prefix** string

**description**

Optional.

The "prefix" attribute stores the Title External System Reference configured by an Admin user in WCM.

**maxLength** 20

**suffix** string

**description**

Optional.

The "suffix" attribute stores the Suffix External System Reference configured by an Admin user in WCM.

**maxLength** 20

**middle** string

**description**

Optional.

The "middle" attribute stores the value for the WCM "Middle Name".

**maxLength** 65

**source** \$ref [CodeableConceptSource](#)

(on page 692)

**originalSource** \$ref [CodeableConceptOriginalSource](#)

(on page 693)

**id** string

**description**

Mandatory.

The "id" attribute stores the Name resource ID that is generated in WCM when a resource is created.

**maxLength** 64

**identifier** array

**description**

Optional.

The Identifier list of objects stores values of external identifiers for the enclosing record.

Identifier objects can be used to create and update records.

An external system can create record identifiers when creating or updating a record. An external system can provide up to 3 identifiers for a record, for each REST call.

An individual's record can be identified using external identifiers.

When invoking this PUT API, identifiers are evaluated before they are added to the record to be updated:

- If no other name record exists with any of these identifiers exist for this individual, the identifiers are added to this record in WCM.
- If another name record already exists in Watson Care Manager for this individual with one of the identifiers provided, the request fails.
- If identifiers already exist for a name record for this individual and the resource ID provided is the one of the name record, the update is successful.

**maxItems** 3

**items**      \$ref [ModifiedIdentifier](#)  
*(on page 697)*

**subject**    \$ref [ModifiedSubject](#)  
*(on page 694)*

**type**    object

#### **required**

- id
- subject
- resourceType
- family
- given

## **DefaultModelError**

### **Properties**

**Error** array

**items** \$ref [Error \(on page 708\)](#)

**type** object

## Error

### Properties

**code** integer(*int32*)

#### **description**

A machine-readable code that identifies the problem. This will not vary with the Accept-Language setting.

**message** string

#### **description**

A human-readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text may change over time.

**level** string

#### **description**

The level of the error.

**type** object

### required

- code
- message
- level

## External Messaging API

Version:v1

By using the protected APIs that follow, you can enable external messaging between Watson Care Manager and external systems, for example, the client's external portal. Care team members can send messages associated with clients through Watson Care Manager, and the external messaging API makes the messages available to the client's external portal. Similarly, clients can send messages from their external portals, and the external messaging API makes the messages available for viewing in Watson

Care Manager to clients' care teams. Outbound messages from Watson Care Manager to external systems can be sent with or without attachments.

## Servers

**https://host/Rest**

### API methods: Get message (by ID)

**GET /v1/ees/externalmessaging/{id}**

Share messaging records associated with a client and make them available to an external system, for example, the client's external portal.

Retrieves a specific message in Watson Care Manager that matches the record ID sent from an external system. **Example request**

cURL

```
curl GET -v -k -H
'Content-Type: application/json' -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H
"Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H 'Referer: curam//foundational.app'
http://host:port/Rest/v1/ees/externalmessaging{id}
```

JAVA

```
HttpResponse response = Unirest.put("https://host:port/Rest/v1/ees/externalmessaging/{id}")
    .header("accept", "application/json")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("Referer", "curam//foundationalapp") .asString();
```

## Parameters

**Referer(header)**

**type** string

**array** curam://foundational.app

**required** true

**X-WCM-TENANT-ID**(*header*)

**type** string

**array** The tenant ID.

**required** true

**X-WCM-TENANT-INSTANCE**(*header*)

**type** string

**array** The tenant instance.

**required** true

**Authorization**(*header*)

**type** string

**array** The Access Token.

**required** true

**X-GRANT-TYPE**(*header*)

**type** string

**array** client\_credentials

**required** true

**id**(*path*)

The internal record ID of the message.

**type** string

**required** true

## Responses

### 200

The get request was successful.

#### Media types

**application/json**

**Schema** [GetExternalMessage](#)

*(on page 718)*

**400**

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error message: EESERR2107 - External message not found.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 721)*

**404**

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

Possible error messages:

EESERR2107 - External message not found.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 721)*

**500**

An internal server error occurred. Contact your administrator for more information.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 721)*

**default**

An unexpected error occurred. Check the error message for further information.

### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 721](#))

API methods: Get an attachment linked to the message

**GET /v1/ees/externalmessage\_attachment/{id}**

Get an attachment linked to the message.

Views the attachment linked to the message by using the message ID.

### Example request

CURL

```
curl -X GET "https://host:port/Rest/v1/ees/externalmessage_attachment/1234" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "accept: application/octet-stream" --output xyz.pdf
```

JAVA

```
HttpResponse<InputStream> response = Unirest.get("https://host:port/Rest/v1/ees/externalmessage_attachment/123")
    .header("accept", "application/octet-stream")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .asBinary();
```

### Parameters

**Referer(header)**

**type** string

**array** curam://foundational.app

**required** true

**X-WCM-TENANT-ID**(*header*)**type** string**array** The tenant ID.**required** true**X-WCM-TENANT-INSTANCE**(*header*)**type** string**array** The tenant instance.**required** true**Authorization**(*header*)**type** string**array** The Access Token.**required** true**X-GRANT-TYPE**(*header*)**type** string**array** client\_credentials**required** true**id**(*path*)

The internal record ID of the message.

**type** integer**required** true**Responses****200**

The get request was successful.

**Media types****application/octet-stream**

**Schema** [GetMessageAttachment](#)  
*(on page 721)*

## 400

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error message: EESERR2116 - External message attachment not found.

### Media types

**application/octet-stream**

**Schema** [DefaultErrorModel](#)  
*(on page 721)*

## 404

The resource requested was not found. Check the error message for more information and resend the request with a valid resource ID.

Possible error message: EESERR2107 - External message not found.

## 500

An internal server error occurred. Contact your administrator for more information.

### Media types

**application/octet-stream**

**Schema** [DefaultErrorModel](#)  
*(on page 721)*

## default

An unexpected error occurred. Check the error message for more information.

### Media types

**application/octet-stream**

**Schema** [DefaultErrorModel](#)  
*(on page 721)*

API methods: Create an external message

## POST /v1/ees/client\_externalmessage

Create a message for a client who is registered in Watson Care Manager.

Creates a message for a client who is registered in Watson Care Manager. Watson Care Manager identifies the client record to create the message based on the client reference number that the external system provides in the body.

CURL

```
curl -X POST "https://host:port/Rest/v1/ees/client_externalmessage" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Content-Type: application/json" -d " { \"resourceType\": \"externalmessaging\", \"messageText\": \"message\", \"createdDateTime\": \"20230112T085000\", \"identifier\": \"12345\" } } "
```

)

JAVA

```
HttpResponse response = Unirest.post("https://host:port/Rest/v1/ees/client_externalmessage")

.header("accept", "application/json")

.header("Authorization", "access_token")

.header("X-GRANT-TYPE", "client_credentials")

.header("X-WCM-TENANT-INSTANCE", "Tenant Instance")

.header("X-WCM-TENANT-ID", "Tenant ID")

.header("Referer", "curam://foundational.app")

.header("Content-Type", "application/json")

.body(" { \"resourceType\": \"externalmessaging\", \"messageText\": \"message\", \"createdDateTime\": \"20230112T085000\", \"identifier\": \"12345\" } } ")

.asString();
```

## Parameters

### Referer(header)

**type** string

**array** curam://foundational.app

**required** true

**X-WCM-TENANT-ID**(*header*)

**type** string

**array** The tenant ID.

**required** true

**X-WCM-TENANT-INSTANCE**(*header*)

**type** string

**array** The tenant instance.

**required** true

**Authorization**(*header*)

**type** string

**array** The Access Token.

**required** true

**X-GRANT-TYPE**(*header*)

**type** string

**array** client\_credentials

**required** true

## Request body

Create external message details.

**Required:**true

### Media types

application/json

**Schema** [CreateExternalMessage](#)

(on page 721)

## Responses

201

The post request was successful.

#### Headers

Name	Description	Schema
Location	The location of the new resource.	<b>type</b> string

#### 400

The data request is invalid. Check the error message for further information and resend the request with the corrected data. The possible error codes are: EESERR2100 - Invalid 'resourceType' entered. EESERR2101 - The date value provided, %1s, is invalid and not in the correct format. EESERR2102 - The 'createdDateTime' is in the future. EESERR2103 - A 'senderUserName' must be provided for this operation. EESERR2104 - Maximum size for the 'MessageText' field is 4000 characters. EESERR2105 - It is mandatory to specify 'createdDateTime'. EESERR2114 - Identifier not found. EESERR2115 - It is mandatory to specify 'messageText'.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 721](#))

#### 500

An internal server error occurred. Contact your administrator for more information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 721](#))

#### default

An unexpected error occurred. Check the error message for further information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

(*on page 721*)

## Components

### Schemas

#### **GetExternalMessage**

##### **Properties**

**id** integer

**description** The unique identifier of the message.

**createdDateTime** string

**description** The date and time when a message record is submitted.

**messageText** string

**description** The message text.

**maxLength** 4000

**senderUserName** string

**description** The user name of the message's sender.

**fileName** string

**description** The filename of the attachment included in the message.

**attachmentURL** string

**description** The attachment URL of the message to retrieve the attachment content.

**identifier** string

**description**  
The client reference number.

**source**      \$ref [Source](#)

(*on page*  
719)

**originalSource**    \$ref [OriginalSource](#)

(*on page*  
719)

**senderType**     \$ref [SenderType](#)

(*on page*  
720)

**type** object

## OriginalSource

### Properties

**text**    string

**description**  
Description of the original source system.

**maxLength** 300

**coding** array

**items** \$ref [CodingPR](#)  
(*on page*  
720)

### description

The name of the original source system where the message first originated. The external system identifies the original source system by its external system reference.

**type**    object

## Source

### Properties

**text**    string

**description**

Description of the source.

**maxLength** 300

**coding** array

**items \$ref** CodingPR

*(on page  
720)*

**description**

The source of the message. The external system identifies the source by its external system reference.

**type** object

## SenderType

### Properties

**text** string

**description**

The type of sender who created the message in Watson Care Manager, for example, care team.

**maxLength** 300

**coding** array

**items \$ref** CodingPR

*(on page  
720)*

**type** object

## CodingPR

### Properties

**system** string

**maxLength** 900

**code** string

**maxLength** 900

**type** object

## GetMessageAttachment

### Properties

**id** integer

**description**

The unique identifier of the message.

**type** object

## CreateExternalMessage

### Properties

**resourceType** string

**description**

External message as a resource type. This is a mandatory field.

**maxLength** 300

**createdDateTime** string

**description**

The date and time when a message record is submitted. This is a mandatory field.

**messageText** string

**description**

The message text. This is a mandatory field.

**maxLength** 4000

**identifier** string

**description**

The client reference number. This is a mandatory field.

**maxLength** 10

**type** object

## DefaultModelError

### Properties

### Error array

```
items $ref Error (on  
page  
722)
```

**type** object

## Error

### Properties

**code** integer(*int32*)

#### description

A machine-readable code that identifies the problem. This code does not vary with the Accept-Language setting.

**message** string

#### description

A human-readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text may change over time.

**level** string

#### description

The level of the error.

**type** object

### required

- code
- message
- level

## (Demographics) Tag API

Version:v1

By using the protected APIs that follow, you can create, update, and delete tag records that are sent to Watson Care Manager for a client from an external system so that Watson Care Manager accurately reflects the external system data. In addition, you can retrieve tag data captured in respect of a client

from Watson Care Manager. The client is identified when Watson Care Manager receives the Watson Care Manager client ID or the external ID and type. The client's tag record is identified when Watson Care Manager receives an identifier type and record id.

## Servers

<https://host/Rest>

### API methods: Create a tag

#### POST /v1/ees/customdata/Tag

Create a tag record for a client who is registered in Watson Care Manager.

Creates a client tag record based on an event in the external system that initiates a transfer of valid data to Watson Care Manager.

#### Example request

cURL

```
curl -X POST "https://host:port/Rest/v1/ees/customdata/Tag" -H "X-WCM-TENANT-ID: Tenant ID" -H
"X-WCM-TENANT-INSTANCE: Tenant Instance" -H "accept: application/json" -H "Referer: curam://foundational.app"
-H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Content-Type: application/json"
-d "{ \"externalSystemReference\": \"tag\", \"customDataType\": \"Tag\", \"subject\": { \"reference\":
\"patient/28416\" }, \"identifier\": [ { \"value\": \"1234533\", \"type\": { \"text\": \"HospitalSys\" } } ], \"source\":
{ \"text\": \"Source\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"s\" } ] }, \"originalSource\":
{ \"text\": \"OriginalSource\", \"coding\": [ { \"system\": \"http://wcm/originalsource\", \"code\":
\"os\" } ] }, \"attributes\": [ { \"name\": \"tag\", \"value\": { \"valueString\": \"Private\" } } ] }
```

JAVA

```
HttpResponse response = Unirest.post("https://host:port/Rest/v1/ees/customdata/Tag")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
```

```

.header("Referer", "curam://foundational.app")

.header("Content-Type", "application/json")

.body("{ \"externalSystemReference\": \"tag\", \"customDataType\": \"Tag\", \"subject\": { \"reference\":
\"patient/28416\" }, \"identifier\": [ { \"value\": \"1234533\", \"type\": { \"text\": \"HospitalSys\" } } ], \"source\":
{ \"text\": \"Source\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"s\" } ] }, \"originalSource\":
{ \"text\": \"OriginalSource\", \"coding\": [ { \"system\": \"http://wcm/originalsource\", \"code\":
\"os\" } ] }, \"attributes\": [ { \"name\": \"tag\", \"value\": { \"valueString\": \"Private\" } } ] }")
.asString();

```

## Parameters

### **Referer(header)**

**type** string

**array** curam://foundational.app

**required** true

### **X-WCM-TENANT-ID(header)**

**type** string

**array** The tenant ID.

**required** true

### **X-WCM-TENANT-INSTANCE(header)**

**type** string

**array** The tenant instance.

**required** true

### **Authorization(header)**

**type** string

**array** The Access Token.

**required** true

### **X-GRANT-TYPE(header)**

**type** string

**array** client\_credentials.

**required** true

## Request body

The inbound message that contains the information required to create a client tag.

**Required:**true

### Media types

**application/json**

**Schema** [CreateCustomData](#)

(*on page 739*)

## Responses

### 201

The post request was successful.

#### Headers

Name	Description	Schema
Location	The location of the new resource.	<b>type</b> string

### 400

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error messages returned: EESERR352 - Custom Client Data record with identifier HospitalSystem - 123456 already exists for this person. EESERR649 - Invalid 'unknownattribute' attribute name provided. EESERR651 - Failed to create a record: Invalid value provided for data attribute 'exampleAttributeName'. EESERR651 - Failed to create a record: Invalid 'test invalid code' value provided for 'valueSet'. EESERR1000 - No shared version found for this Custom Data Type. EESERR1001 - 'externalSystemReference' doesn't match with the given 'customDataType'. EESERR1002 - The Custom Data Type record pay load is missing the following attributes: [exampleAttributeName].

### 500

An internal server error occurred. Contact your administrator for more information.

### **default**

An unexpected error occurred. Check the error message for more information.

## API methods: Update a tag

### **PUT /v1/ees/customdata/Tag**

Update a tag record for a client who is registered in Watson Care Manager.

Updates a client's tag record assuming that a matching record is found when the external system initiates a transfer of valid data to Watson Care Manager. Watson Care Manager identifies the record to be updated based on the external identifiers that the external system provides in the body. If no matching tag record is found, Watson Care Manager creates a new tag record for the individual.

### **Example request**

#### CURL

```
curl -X PUT "https://host:port/Rest/v1/ees/customdata/Tag" -H "X-WCM-TENANT-ID: Tenant ID" -H
"X-WCM-TENANT-INSTANCE: Tenant Instance" -H "accept: application/json" -H "Referer: curam://foundational.app"
-H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Content-Type: application/json"
-d "{\"externalSystemReference\": \"tag\", \"customDataType\": \"Tag\", \"subject\": { \"reference\":
\"patient/28416\" }, \"identifier\": [ { \"value\": \"1234533\", \"type\": { \"text\": \"HospitalSys\" } }, \"source\":
{ \"text\": \"Source\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"s\" } ] }, \"originalSource\":
{ \"text\": \"OriginalSource\", \"coding\": [ { \"system\": \"http://wcm/originalsource\", \"code\":
\"os\" } ] }, \"attributes\": [ { \"name\": \"tag\", \"value\": { \"valueString\": \"Private\" } } ] }
```

#### JAVA

```
HttpResponse response = Unirest.put("https://host:port/Rest/v1/ees/customdata/Tag")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
```

```

.header("Content-Type", "application/json")

.body("{
  \"externalSystemReference\": \"tag\",
  \"customDataType\": \"Tag\",
  \"subject\": {
    \"reference\": \"patient/28416\",
    \"identifier\": [
      {
        \"value\": \"1234533\",
        \"type\": {
          \"text\": \"HospitalSys\"
        }
      }
    ],
    \"source\": {
      \"text\": \"Source\",
      \"coding\": [
        {
          \"system\": \"http://wcm/source\",
          \"code\": \"s\"
        }
      ]
    },
    \"originalSource\": {
      \"text\": \"OriginalSource\",
      \"coding\": [
        {
          \"system\": \"http://wcm/originalsource\",
          \"code\": \"os\"
        }
      ]
    }
  },
  \"attributes\": [
    {
      \"name\": \"tag\",
      \"value\": {
        \"valueString\": \"Private\"
      }
    }
  ]
}.asString());

```

## Parameters

### **Referer(header)**

**type** string

**array** curam://foundational.app

**required** true

### **X-WCM-TENANT-ID(header)**

**type** string

**array** The tenant ID.

**required** true

### **X-WCM-TENANT-INSTANCE(header)**

**type** string

**array** The tenant instance.

**required** true

### **Authorization(header)**

**type** string

**array** The Access Token.

**required** true

### **X-GRANT-TYPE(header)**

**type** string

**array** client\_credentials.

**required** true

## Request body

The inbound message that contains the information required to create a client tag.

**Required:** true

### Media types

**application/json**

**Schema** [CreateCustomData](#)

(*on page 739*)

## Responses

### 200

The put request was successful.

### Media types

**application/json**

**Schema** [UpdateCustomData](#)

(*on page 743*)

### 400

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error messages returned: EESERR352 - Custom Client Data record with identifier HospitalSystem - 123456 already exists for this person. EESERR649 - Invalid 'unknownattribute' attribute name provided. EESERR651 - Failed to create a record: Invalid value provided for data attribute 'exampleAttributeName'. EESERR651 - Failed to create a record: Invalid 'test invalid code' value provided for 'valueSet' EESERR1000 - No shared version found for this Custom Data Type. EESERR1001 - 'externalSystemReference' doesn't match with the given 'customDataType'. EESERR1002 - The Custom Data Type record pay load is missing the following attributes: [exampleAttributeName].

### 500

An internal server error occurred. Contact your administrator for more information.

**default**

An unexpected error occurred. Check the error message for more information.

## API methods: Update a tag (by ID)

### PUT /v1/ees/customdata/Tag/{id}

Update a tag record for a client who is registered in Watson Care Manager.

Updates a client's tag record assuming that a matching record is found when the external system initiates a transfer of valid data to Watson Care Manager. Watson Care Manager identifies the record to be updated based on the resource ID that the external system provides in the path and body.

#### Example request

## cURL

```
curl -X PUT "https://host:port/Rest/v1/ees/customdata/Tag/12345" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Content-Type: application/json" -d "{ \"id\": \"12345\", \"externalSystemReference\": \"tag\", \"customDataType\": \"Tag\", \"subject\": { \"reference\": \"patient/28416\" }, \"identifier\": [ { \"value\": \"1234533\", \"type\": { \"text\": \"HospitalSys\" } }, { \"source\": { \"text\": \"Source\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"s\" } ] }, \"originalSource\": { \"text\": \"OriginalSource\", \"coding\": [ { \"system\": \"http://wcm/originalsource\", \"code\": \"os\" } ] }, \"attributes\": [ { \"name\": \"tag\", \"value\": { \"valueString\": \"Private\" } } ] } }
```

## JAVA

```
HttpResponse response = Unirest.put("https://host:port/Rest/v1/ees/customdata/Tag/12345")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
    .header("Content-Type", "application/json")
```

```
.body("{
  \"id\": \"12345\",
  \"externalSystemReference\": \"tag\",
  \"customDataType\": \"Tag\",
  \"subject\": {
    \"reference\": \"patient/28416\",
    \"identifier\": [
      {
        \"value\": \"1234533\",
        \"type\": {
          \"text\": \"HospitalSys\"
        }
      }
    ],
    \"source\": {
      \"text\": \"Source\",
      \"coding\": [
        {
          \"system\": \"http://wcm/source\",
          \"code\": \"s\",
          \"os\": []
        }
      ],
      \"originalSource\": {
        \"text\": \"OriginalSource\",
        \"coding\": [
          {
            \"system\": \"http://wcm/originalsource\",
            \"code\": \"os\"
          }
        ]
      },
      \"attributes\": [
        {
          \"name\": \"tag\",
          \"value\": {
            \"valueString\": \"Private\"
          }
        }
      ]
    }
  }
}.asString());
```

## Parameters

### **Referer**(*header*)

**type** string  
**array** curam://foundational.app  
**required** true

### **X-WCM-TENANT-ID**(*header*)

**type** string  
**array** The tenant ID.  
**required** true

### **X-WCM-TENANT-INSTANCE**(*header*)

**type** string  
**array** The tenant instance.  
**required** true

### **Authorization**(*header*)

**type** string  
**array** The Access Token.  
**required** true

### **X-GRANT-TYPE**(*header*)

**type** string  
**array** client\_credentials.  
**required** true

**id(path)**

Mandatory. The "id" attribute stores the resource ID of the client data resource ID to be updated.

**type** string

**maxLength** 900

**required** true

## Request body

The inbound message that contains the information required to create a client tag.

**Required:**true

### Media types

application/json

**Schema** [UpdateCustomData](#)

(*on page 743*)

## Responses

### 200

The put request was successful.

### Media types

application/json

**Schema** [UpdateCustomData](#)

(*on page 743*)

### 400

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error messages returned: EESERR351 - The resource id provided doesn't exist for a Custom Client Data record for this person. EESERR352 - Custom Client Data record with identifier HospitalSystem - 123456 already exists for this person. EESERR354 - Resource id and identifier(s) match different Custom Client Data records for this person. EESERR356 - Resource Custom Client Data/123 doesn't exist. EESERR623 - The record was updated by a care manager and cannot be updated by an external system. EESERR626 - The record doesn't

exist. EESERR649 - Invalid 'unknownattribute' attribute name provided. EESERR652 - Failed to update a record: Invalid value provided for data attribute 'exampleAttributeName'. EESERR652 - Failed to update a record: Invalid 'test invalid code' value provided for 'valueSet'. EESERR653 - Failed to delete a record: EESERR624 - The record was updated by a care manager and cannot be deleted by an external system. EESERR1000 - No shared version found for this Custom Data Type. EESERR1001 - 'externalSystemReference' doesn't match with the given 'customDataType'. EESERR1002 - The Custom Data Type record pay load is missing the following attributes: [exampleAttributeName].

## 500

An internal server error occurred. Contact your administrator for more information.

## default

An unexpected error occurred. Check the error message for more information.

## API methods: Get a tag

### GET /v1/ees/customdata/Tag/{id}

Get a tag record for a client who is registered in Watson Care Manager.

Get a tag record based on its ID. The URL contains the ID of the tag record. For example, if the ID of the tag record is 123, the URL contained in the notification is /Rest/v1/ees/customdata/Tag/123. The external system must call this URL to retrieve the tag details.

#### Example request

##### CURL

```
curl -X GET "https://host:port/Rest/v1/ees/customdata/Tag/123" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Content-Type: application/json"
```

##### JAVA

```
HttpResponse response = Unirest.get("https://host:port/Rest/v1/ees/customdata/Tag/123")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
```

```
.header("X-GRANT-TYPE", "client_credentials")

.header("X-WCM-TENANT-INSTANCE", "Tenant Instance")

.header("X-WCM-TENANT-ID", "Tenant ID")

.header("Referer", "curam://foundational.app")

.asString();
```

## Parameters

### **Referer(header)**

**type** string  
**array** curam://foundational.app  
**required** true

### **X-WCM-TENANT-ID(header)**

**type** string  
**array** The tenant ID.  
**required** true

### **X-WCM-TENANT-INSTANCE(header)**

**type** string  
**array** The tenant instance.  
**required** true

### **Authorization(header)**

**type** string  
**array** The Access Token.  
**required** true

### **X-GRANT-TYPE(header)**

**type** string  
**array** client\_credentials.  
**required** true

### **id(path)**

Mandatory. The "id" attribute stores the resource ID of the client data resource ID to be retrieved.

**type** string  
**maxLength** 900

**required** true

## Responses

### 200

The get request was successful.

#### Media types

**application/json**

**Schema** [UpdateCustomData](#)  
(*on page 743*)

### 400

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error messages returned: EESERR626 - The record doesn't exist.

### 500

An internal server error occurred. Contact your administrator for more information.

#### default

An unexpected error occurred. Check the error message for more information.

## API methods: Delete a tag

**DELETE /v1/ees/customdata/Tag/{id}**

Delete a tag record for a client who is registered in Watson Care Manager.

Deletes a client's tag based on a delete event in the external system that initiates a transfer of information to Watson Care Manager. Watson Care Manager identifies the record to be deleted based on the resource ID that the external system provides.

### Example request

CURL

```
curl -X DELETE "https://host:port/v1/ees/customdata/Tag/123" "X-WCM-TENANT-ID: Tenant ID" -H
"X-WCM-TENANT-INSTANCE: Tenant Instance" -H "accept: application/json" -H "Referer: curam://foundational.app" -H
"Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Content-Type: application/json"
```

JAVA

```
HttpResponse response = Unirest.delete("https://host:port/v1/ees/customdata/Tag/123")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
    .asString();
```

### Parameters

#### **Referer(*header*)**

**type** string

**array** curam://foundational.app

**required** true

#### **X-WCM-TENANT-ID(*header*)**

**type** string

**array** The tenant ID.

**required** true

#### **X-WCM-TENANT-INSTANCE(*header*)**

**type** string

**array** The tenant instance.

**required** true

#### **Authorization(header)**

**type** string

**array** The Access Token.

**required** true

#### **X-GRANT-TYPE(header)**

**type** string

**array** client\_credentials.

**required** true

#### **id(path)**

Mandatory. The "id" attribute stores the resource ID of the client data resource ID to be deleted.

**type** string

**maxLength** 900

**required** true

## Responses

### 204

The delete request was successful.

### 400

The data request is invalid. Check the error message for more information and resend the request with the corrected data.

Possible error messages returned: EESERR626 - The record doesn't exist.

### 500

An internal server error occurred. Contact your administrator for more information.

### default

An unexpected error occurred. Check the error message for more information.

## Components

### Schemas

#### Value

##### Properties

**valueString** string

**maxLength** 100

##### description

Mandatory. The string value of the tag. It must match a configured tag value in Watson Care Manager.

**type** object

### Subject

##### Properties

**reference** string

##### description

Mandatory. The Subject object is used to identify an individual in Watson Care Manager.

The "reference" String is expected to contain identifier details that will be used to match an individual in Watson Care Manager.

The string is parsed to extract query parameters and associated values.

The string can contain a combination of

(1) WCM Patient ID (that is, the Watson Care Manager Reference Number), (2) WCM Identification External System Reference and Identification number, (3) WCM Identification Type and Identification number, (4) WCM Identification External System Reference and Identification number and birthDate, (5) WCM Identification Type and Identification number and birthDate.

For example:

(1) WCM Patient ID

```
"subject":{  
    "reference" : "patient/123      " }
```

(2) WCM Identification External System Reference and Identification number

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239" }
```

(3) WCM Identification External System Reference and Identification number,

```
"subject":{  
    "reference" : "patient/identifier=Passport, identifiervalue=239" }
```

(4) WCM Identification External System Reference and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239,  
    birthDate=19380821" }
```

(5) WCM Identification Type and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=Passport, identifiervalue=239,  
    birthDate=19380821" }
```

**example** patient/28416

**type** object

## Attribute

### Properties

**name** string

**maxLength** 3

**description**

Mandatory. The name of the attribute. The expected name is always 'tag'.

**value \$ref**[Value](#)*(on page  
737)***type** object

## CreateCustomData

### Properties

**externalSystemReference** string**description**

Mandatory. The external system reference for the client data type that Watson Care Manager uses to store tag data. The expected external system reference is always 'tag'.

**maxLength** 3**example** tag**customDataType** string**description**

Mandatory. The name of the client data type that Watson Care Manager uses to store tag data. The expected name is always 'Tag'.

**maxLength** 3**example** Tag**subject** \$ref [Subject](#)*(on page  
737)***identifier** \$ref [Identifier](#)*(on page  
742)***source** \$ref [CodeableConceptSource](#)*(on page 740)***originalSource** \$ref [CodeableConceptOriginalSource](#)*(on page 741)***attributes** array

**items \$ref** Attribute  
(*on page*  
738)  
**array name** tag  
**value valueString** Private

**type** object

**required**

- name
- photoUrls

## CodeableConceptSource

### Properties

**text** string

**description**  
Optional

Textual description of codeable concept.

**coding** array

**maxItems** 1

**items** \$ref CodingSource  
(*on page*  
740)

**type** object

## CodingSource

### Properties

**system** string

**description**  
Mandatory.

"http://wcm/source" for source.

**array** http://wcm/source

**code** string

**description**

Mandatory. The "code" value describes the source system. The value provided maps to Watson Care Manager Source System

**maxLength** 20

**type** object

## CodeableConceptOriginalSource

### Properties

**text** string

**description**

Optional

Textual description of codeable concept.

**coding** array

**maxItems** 1

**items** \$ref CodingOriginalSource

(on page 741)

**type** object

## CodingOriginalSource

### Properties

**system** string

**description**

Mandatory.

"http://wcm/originalsource" for orginal source.

**array** http://wcm/originalsource

**code** string

**description**

Mandatory. The "code" value describes the original source system. The value provided maps to Watson Care Manager Original Source System

**maxLength** 20

**type** object

**identifier**

**type** array

**description** Optional.

The Identifier list of objects stores values of external identifiers for the enclosing record.

Identifier objects can be used to create and update records.

An external system can provide up to 3 identifiers for a record.

When a record is created with an external identifier, the same identifier provided can be used to identify a record. Therefore send a PUT request to update the record.

For Example: An Identification record is created providing an identifier with the following values: identifier.type.text = "ExtSys1" identifier.value = "698368" A PUT request with an updated content and identifier as follows: identifier.type.text = "ExtSys1" identifier.value = "698368" can be sent using the following url: /Rest/v1/ees/Tag The Tag record is updated.

**maxItems** 3

**items** \$ref [Identifier](#)

(*on page  
742*)

**Identifier**

**Properties**

**value** string

**description**

Optional.

This attribute stores the external identifier value. If provided, a type.text value must be provided.

**maxLength** 100  
**example** 698368  
**type** \$ref [CodeableConcept](#)  
(*on page 743*)

**type** object

## CodeableConcept

### Properties

**text** string

**description** Optional.

This attribute stores the value for the identifier type. It must be provided if an identifier value is provided.

**maxLength** 100  
**example** ExtSys1

**type** object

## UpdateCustomData

### Properties

**externalSystemReference** string

**description** Mandatory. The external system reference for the client data type that Watson Care Manager uses to store tag data. The expected external system reference is always 'tag'.

**maxLength** 3  
**example** tag  
**customDataType** string

<b>description</b>	Mandatory. The name of the client data type that Watson Care Manager uses to store tag data. The expected name is always 'Tag'.
<b>maxLength</b>	3
<b>example</b>	Tag
<b>id</b>	string
	<b>example</b> 12345
	<b>maxLength</b> 64
<b>description</b>	The "id" attribute stores the Identification resource ID.
<b>subject</b>	\$ref <a href="#">Subject</a> <i>(on page 737)</i>
<b>identifier</b>	\$ref <a href="#">identifier</a> <i>(on page 742)</i>
<b>source</b>	\$ref <a href="#">CodeableConceptSource</a> <i>(on page 740)</i>
<b>originalSource</b>	\$ref <a href="#">CodeableConceptOriginalSource</a> <i>(on page 741)</i>
<b>attributes</b>	array  items \$ref <a href="#">Attribute</a> <i>(on page 738)</i>  array <b>name</b> tag <b>value</b> <b>valueString</b> Private
<b>type</b>	object
<b>required</b>	<ul style="list-style-type: none"> <li>• name</li> <li>• photoUrls</li> </ul>

## (External Provider) Contact API

Version:1.0

By using the protected APIs that follow, you can create, update, or close provider contact records in Watson Care Manager so that Watson Care Manager accurately reflects the external system data. When a contact is created, an external identifier is provided as part of the API. The identifier is then used to identify the contact whose records are to be updated or closed.

A contact can be associated with a provider. For example, the organization's main contact. If only the provider identifier is provided, the contact is only associated with the provider. A contact can be associated with a provider and a service offering for that provider. For example, the contact responsible for a specific service offering for the provider. If the provider external identifier and the service external identifier is provided, the contact is associated with the provider and the service offering. The contact records that the API creates are read-only in the Watson Care Manager Tenant Administration application.

you@your-company.com

### Servers

`http://host/Rest https://host/Rest`

### API methods: Contact

#### POST /v1/epa/contact

Create contact records for providers and provider service offerings in Watson Care Manager.

```
cURL curl -X POST "https://host:port/Rest/v1/epa/contact" -H "accept: application/json" -H
"Content-Type: application/json" -d " { "messageID" : "123", "id" : "extContactESR1", "organization_id":
"extProvider466000", "service_id": "extService466000", "name": "Ext contact name1", "title": "Manager",
"email": "extContact1@example.com", "mobile_phone": { "id": "extMobileESR1", "number": "9342389951" },
"personal_phone": { "id": "extPhoneESR1", "number": "9342389952" }, "source": { "coding": [{ "system":
"http://wcm/source", "code": "ExtSS466000" }], "text": "Acme Systems" }, "originalSource": { "coding":
[ { "system": "http://wcm/originalsource", "code": "ExtSS466001" }], "text": "Acme Systems" } } " JAVA
HttpResponse response = Unirest.post("https://host:port/Rest/v1/epa/contact") .header("accept",
"application/json") .header("Content-Type", "application/json") .body(" { "messageID" : "123", "id" :
"extContactESR1", "organization_id": "extProvider466000", "service_id": "extService466000", "name":
"Ext contact name1", "title": "Manager", "email": "extContact1@example.com", "mobile_phone": { "id":
"extMobileESR1", "number": "9342389951" }, "personal_phone": { "id": "extPhoneESR1", "number":
```

```
"9342389952"}, "source": { "coding": [{ "system": "http://wcm/source", "code": "ExtSS466000" }], "text": "Acme Systems" }, "originalSource": { "coding": [{ "system": "http://wcm/originalsource", "code": "ExtSS466001" }], "text": "Acme Systems" }}) .asString();
```

## Parameters

**body**(*body*)

**The request body in the JSON format.**

**Schema:** [NewContactInfo \(on page 750\)](#)

**required** true

## Responses

**201**

The post request was successful.

### Headers

Name	Description	Schema
Location	The location of the new resource.	<b>type</b> string

**400**

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

The following list outlines the possible error messages: EPAERR3301 - Phone, mobile phone, or email address must be entered. EPAERR3302 - The 'name' entered is too long. The maximum characters that is allowed is 65. EPAERR3303 - The 'title' entered is too long. The maximum characters that is allowed is 100. EPAERR3304 - The contact ID is invalid. EPAERR3305 - The contact ID exists. EPAERR3306 - The contact ID is not associated with the service ID.

### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 758)*

**500**

An internal server error occurred. Contact your administrator for more information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 758](#))

#### default

An unexpected error occurred. Check the error message for further information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 758](#))

## PUT /v1/epa/contact

Update contact records for providers and provider service offerings in Watson Care Manager.

```
cURL curl -X POST "https://host:port/Rest/v1/epa/contact" -H "accept: application/json" -H  
"Content-Type: application/json" -d " { \"messageID\" : \"123\", \"id\" : \"extContactESR1\", \"organization_id\":  
\"extProvider466000\", \"service_id\": \"extService466000\", \"name\": \"Ext contact name1\", \"title\": \"Manager\",  
\"email\": \"extContact1@example.com\", \"mobile_phone\": { \"id\": \"extMobileESR1\", \"number\": \"9342389951\" },  
\"personal_phone\": { \"id\": \"extPhoneESR1\", \"number\": \"9342389952\" } } " JAVA HttpResponse  
response = Unirest.post("https://host:port/Rest/v1/epa/contact") .header("accept", "application/  
json") .header("Content-Type", "application/json") .body(" { \"messageID\" : \"123\", \"id\" : \"extContactESR1\",  
\"organization_id\": \"extProvider466000\", \"service_id\": \"extService466000\", \"name\": \"Ext contact name1\",  
\"title\": \"Manager\", \"email\": \"extContact1@example.com\", \"mobile_phone\": { \"id\": \"extMobileESR1\", \"number\":  
\"9342389951\" }, \"personal_phone\": { \"id\": \"extPhoneESR1\", \"number\": \"9342389952\" } } ") .asString();
```

#### Parameters

**body**(*body*)

The request body in the JSON format.

**Schema:** [ModifiedContactInfo](#) ([on page 752](#))

**required**true

## Responses

### 200

The put request was successful.

#### Media types

**application/json**

**Schema** [UpdateContactResponse](#)

*(on page 755)*

### 400

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

The following list outlines the possible error messages: EPAERR3301 - Phone, mobile phone or email address must be entered. EPAERR3302 - The 'name' entered is too long. The maximum characters that is allowed is 65. EPAERR3303 - The 'title' entered is too long. The maximum characters that is allowed is 100. EPAERR3304 - The contact ID is invalid. EPAERR3305 - The contact ID exists. EPAERR3306 - The contact ID is not associated with the service ID.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 758)*

### 500

An internal server error occurred. Contact your administrator for more information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 758)*

### default

An unexpected error occurred. Check the error message for further information.

#### Media types

**application/json****Schema** [DefaultErrorModel](#)*(on page 758)*

## POST /v1/epa/contact/close

Delete contact records for providers and provider service offerings in Watson Care Manager.

```
cURL curl -X POST "https://host:port/Rest/v1/epa/contact/close" -H "accept: application/json" -H "Content-Type: application/json" -d " { "messageID" : "123", "id" : "extContactESR1", "organization_id": "extProvider466000", "service_id": "extService466000"} " JAVA HttpResponse
response = Unirest.post("https://host:port/Rest/v1/epa/contact/close") .header("accept", "application/json") .header("Content-Type", "application/json") .body(" { "messageID" : "123", "id" : "extContactESR1", "organization_id": "extProvider466000", "service_id": "extService466000"} ") .asString();
```

### Parameters

**contactID**(*body*)

The JSON object that contains the referene ID of a contact..

**Schema:** [DeleteContact](#) (*on page 756*)

**required**true

### Responses

**200**

The post request was successful.

#### Media types

**application/json**

**Schema type** array

**items \$ref** [ActionCountResponse](#)

*(on page 758)***500**

An internal server error occurred. Contact your administrator for more information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 758](#))

**default**

An unexpected error occurred. Check the error message for further information.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 758](#))

## Components

### Schemas

#### NewContactInfo

**Properties**

**messageID** integer(*int64*)

**example** 1552641913250

**description** The internal record ID for a contact. The field is optional.

**id** string

**example** extcontactESR1

**description** The unique identifier of a contact. The field is mandatory.

**minLength** 0

**maxLength** 20

**organization\_id** string

**example** extOrg466000

	<b>description</b> The reference identifier for an organization. The field is mandatory.
	<b>minLength</b> 0
	<b>maxLength</b> 20
<b>service_id</b>	string
	<b>example</b> extService466000
	<b>description</b> The reference identifier for a service. The field is optional.
	<b>minLength</b> 0
	<b>maxLength</b> 20
<b>name</b>	\$ref <a href="#">NewContactName</a> <i>(on page 753)</i>
<b>title</b>	string
	<b>example</b> Manager
	<b>description</b> The role or title of the contact member. The field is optional.
	<b>minLength</b> 0
	<b>maxLength</b> 100
<b>email</b>	string
	<b>example</b> extContact1@example.com
	<b>description</b> The email ID of the contact member. Either of the contact numbers or the email ID must be provided.
	<b>minLength</b> 0
	<b>maxLength</b> 256
<b>mobile_phone</b>	\$ref <a href="#">MobilePhoneInfo</a> <i>(on page 754)</i>
<b>personal_phone</b>	\$ref <a href="#">PersonalPhoneInfo</a> <i>(on page 754)</i>
<b>originalSource</b>	object

<b>description</b>	Contains the original source system details. The system and the code that corresponds to the original source system of the note. The system reference of the source is <code>http://wcm/originalsourcecode</code> . The field is optional.
<b>\$ref</b>	<a href="#">ExternalContactSource (on page 755)</a>
<b>source</b>	object
<b>description</b>	Contains the original source details. The system and the code that corresponds to the source of the note. The system <code>http://wcm/sourcecode</code> is the external system reference of the source. The field is optional.
<b>\$ref</b>	<a href="#">ExternalContactSource (on page 755)</a>

**type** object

## ModifiedContactInfo

### Properties

**messageID** integer(*int64*)

**example** 1552641913250

**description**  
The internal record ID for a contact. The field is optional.

**id** string

**example** extcontactESR1

**description**  
The unique identifier of a contact. The field is mandatory.

**minLength** 0

**maxLength** 20

**organization\_id** string

**example** extOrg466000

**description**  
The reference identifier for an organization. The field is mandatory.

**minLength** 0  
**maxLength** 20

**service\_id** string

**example** extService466000

**description** The reference identifier for a service. The field is optional.

**minLength** 0  
**maxLength** 20

**name** \$ref [ModifiedContactName](#)  
*(on page 754)*

**title** string

**example** Manager

**description** The role or title of the contact member. The field is optional.

**minLength** 0  
**maxLength** 100

**email** string

**example** extContact1@example.com

**description** The email ID of the contact member. Either of the contact numbers or the email ID must be provided.

**minLength** 0  
**maxLength** 256

**mobile\_phone** \$ref [MobilePhoneInfo](#)  
*(on page 754)*

**personal\_phone** \$ref [PersonalPhoneInfo](#)  
*(on page 754)*

**type** object

## NewContactName

**type** string

**example** Ext contact name1

**description**

The full name of the contact member. The field is optional.

**minLength** 0

**maxLength** 65

## ModifiedContactName

**type** string

**example** Ext contact name2

**description**

The full name of the contact member. The field is optional.

**minLength** 0

**maxLength** 65

## MobilePhoneInfo

### Properties

**id** string

**example** extMobileESR1

**description**

The reference identifier for an external contact number. Either of the contact numbers or the email ID must be provided.

**minLength** 0

**maxLength** 20

**number** number

**example** 9123456789

**description**

The mobile phone number. The field is mandatory.

**minLength** 0

**maxLength** 20

**type** object

## PersonalPhoneInfo

### Properties

**id** string

**example** extPhoneESR1

**description**

The reference identifier for an external contact number. Either of the contact numbers or the email ID must be provided.

**minLength** 0

**maxLength** 20

**number** number

**example** 9123456789

**description**

The mobile phone number. The field is mandatory.

**minLength** 0

**maxLength** 20

**type** object

## ExternalContactSource

### Properties

**text** string

**example** Acme Systems

**description**

The source details.

**minLength** 0

**maxLength** 100

**coding** \$ref [SourceCoding](#)

(on page

757)

**type** object

## UpdateContactResponse

### Properties

**message** string

**example** OK

**description**

The response message from the API.

**entries** array

**description**

The WCM internal ID of the contact  
is updated.

**uniqueItems** true

**items** \$ref [ModifiedContactInfo](#)

(*on page 752*)

**type** object

## DeleteContact

### Properties

**messageID** integer(*int64*)

**example** 1552641913250

**description**

The internal record ID for a contact. The field is optional

**id** string

**example** extcontactESR1

**description**

The unique identifier of a contact. The field is  
mandatory.

**minLength** 0

**maxLength** 20

**organization\_id** string

**example** extOrg466000

**description**

The reference identifier for an organization. The field is  
mandatory.

**minLength** 0

**maxLength** 20

**service\_id** string

**example** extService466000

**description**

The reference identifier for a service. The field is optional.

**minLength** 0

**maxLength** 20

**type** object

## SourceCoding

### Properties

**system** string

**example** http://wcm/originalsource

**description**

The FHIR system details.

**minLength** 0

**maxLength** 100

**code** string

**example** ExtSS466001

**description**

The FHIR code reference details.

**minLength** 0

**maxLength** 100

**type** object

## GenericResponse

### Properties

**message** string

**example** OK

**description**  
The response message from the API.

**type** object

## ActionCountResponse

### Properties

**successCount** integer(*int32*)

**example** 8

**description**  
The success count.

**failureCount** integer(*int32*)

**example** 2

**description**  
The failure count.

**totalCount** integer(*int32*)

**example** 10

**description**  
The total number  
of entries.

**type** object

## DefaultErrorModel

### Properties

**Error** array

**items** \$ref [Error \(on page 758\)](#)

**type** object

## Error

### Properties

**code** integer(*int32*)

**description**

A machine-readable code that identifies the problem. This code does not vary with the Accept-Language setting.

**message** string

**description**

A human-readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text can change over time.

**level** string

**description**

The level of the error.

**type** object

**required**

- code
- message
- level

## (External Provider) Fees API

Version:1.0

By using the protected APIs that follow, you can create, update, or close provider service offering, unit, and fee information in Watson Care Manager so that Watson Care Manager accurately reflects the external system data. All units that are created by using the API are created as unit list page entries in the tenant admin service library (if they do not already exist). Fee and unit information can influence the provider service offering that is added to a client's plan. For example, Provider A offers home help at \$30 per hour and Provider B offers home help at \$17 per half hour. As the client needs two half hour sessions per week, Provider B is more suitable for the client. The unit and fee records that the API creates are read-only in the Watson Care Manager Tenant Administration application.

you@your-company.com

### Servers

`http://host/api https://host/api`

## API methods: Fee

### POST /v1/epa/fee

Create unit and fee records for provider service offerings in Watson Care Manager.

```
cURL curl -X POST "https://host:port/Rest/v1/epa/fee" -H "accept: application/json" -H "Content-Type: application/json" -d " { "messageID" : "123", "id" : "extFeeESR2", "organization_id": "extProvider466000", "service_id": "extService466000", "fees": "21", "unit" : { "id": "extUnitESR2", "name": "ext Unit2 name" }, "start_date": "2012-02-21", "end_date": "", "source": { "coding": [ { "system": "http://wcm/source", "code": "ExtSS466000" }], "text": "Acme Systems" }, "originalSource": { "coding": [ { "system": "http://wcm/originalsource", "code": "ExtSS466001" }], "text": "Acme Systems" } } " JAVA HttpResponse response = Unirest.post("https://host:port/Rest/v1/epa/fee") .header("accept", "application/json") .header("Content-Type", "application/json") .body(" { "messageID" : "123", "id" : "extFeeESR2", "organization_id": "extProvider466000", "service_id": "extService466000", "fees": "21", "unit" : { "id": "extUnitESR2", "name": "ext Unit2 name" }, "start_date": "2012-02-21", "end_date": "", "source": { "coding": [ { "system": "http://wcm/source", "code": "ExtSS466000" }], "text": "Acme Systems" }, "originalSource": { "coding": [ { "system": "http://wcm/originalsource", "code": "ExtSS466001" }], "text": "Acme Systems" } } ") .asString();
```

#### Parameters

##### **body**(*body*)

The request body in the JSON format.

**Schema:** [NewFeeInfo \(on page 764\)](#)

**required** true

#### Responses

##### 201

The post request was successful.

##### Headers

Name	Description	Schema
Location	The location of the new resource.	<b>type</b> string

##### 400

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 771)*

**500**

An internal server error occurred. Contact your administrator for more information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 771)*

**default**

An unexpected error occurred. Check the error message for further information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 771)*

## PUT /v1/epa/fee

Update unit and fee records for provider service offerings in Watson Care Manager.

```
cURL curl -X POST "https://host:port/Rest/v1/epa/fee" -H "accept: application/json" -H "Content-Type: application/json" -d " { \"messageID\" : \"123\", \"id\" : \"extFeeESR2\", \"organization_id\": \"extProvider466000\", \"service_id\": \"extService466000\", \"fees\": \"21\", \"unit\" : { \"id\": \"extUnitESR2\", \"name\": \"ext Unit2 name\" }, \"start_date\": \"2012-02-21\", \"end_date\": \"\"} " JAVA HttpResponse response = Unirest.post("https://host:port/Rest/v1/epa/fee") .header("accept", "application/json") .header("Content-Type", "application/json") .body(" { \"messageID\" : \"123\", \"id\" : \"extFeeESR2\", \"organization_id\": \"extProvider466000\", \"service_id\": \"extService466000\", \"fees\": \"21\", \"unit\" : { \"id\": \"extUnitESR2\", \"name\": \"ext Unit2 name\" }, \"start_date\": \"2012-02-21\", \"end_date\": \"\"} ") .asString();
```

## Parameters

**body**(*body*)

The request body in the JSON format.

**Schema:** [ModifiedFeeInfo \(on page 766\)](#)

**required** true

## Responses

**200**

The put request was successful.

**Media types**

**application/json**

**Schema** [UpdateFeeResponse](#)

*(on page 767)*

**400**

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 771)*

**500**

An internal server error occurred. Contact your administrator for more information.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 771)*

**default**

An unexpected error occurred. Check the error message for further information.

## Media types

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 771](#))

## POST /v1/epa/fee/close

Delete unit and fee records for provider service offerings in Watson Care Manager.

```
cURL curl -X POST "https://host:port/Rest/v1/epa/fee/close" -H "accept: application/json" -H  
"Content-Type: application/json" -d " { \"messageID\" : \"123\", \"id\" : \"extFeeESR2\", \"organization_id\":  
\"extProvider466000\", \"service_id\": \"extService466000\"} " JAVA HttpResponse response =  
Unirest.post("https://host:port/Rest/v1/epa/fee/close") .header("accept", "application/  
json") .header("Content-Type", "application/json") .body(" { \"messageID\" : \"123\", \"id\" : \"extFeeESR2\",  
\"organization_id\": \"extProvider466000\", \"service_id\": \"extService466000\"} ") .asString();
```

## Parameters

**serviceID**(*body*)

The JSON object that contains the reference ID of a service..

**Schema:** [DeleteFeeDetails](#) ([on page 769](#))

**required** true

## Responses

**200**

The post request was successful.

### Media types

**application/json**

**Schema type** array

**items \$ref** [ActionCountResponse](#)

([on page 770](#))

**500**

An internal server error occurred. Contact your administrator for more information.

## Media types

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 771](#))

## default

An unexpected error occurred. Check the error message for further information.

## Media types

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 771](#))

# Components

## Schemas

### NewFeeInfo

#### Properties

**messageID** integer(*int64*)

**example** 1552641913250

**description**

The internal record ID for a location. The field is optional.

**id** string

**example** extFeeESR1

**description**

The unique identifier of the location. The field is mandatory.

**minLength** 0

**maxLength** 20

**organization\_id** string

**example** extOrgID466000

	<b>description</b> The reference identifier for an organization. The field is mandatory.
	<b>minLength</b> 0
	<b>maxLength</b> 20
<b>service_id</b>	string
	<b>example</b> extServiceID466000
	<b>description</b> The service identifier for a location. The field is mandatory.
	<b>minLength</b> 0
	<b>maxLength</b> 20
<b>fees</b>	string( <i>money</i> )
	<b>description</b> The fee for the service. The field is mandatory.
<b>unit</b>	\$ref <a href="#">NewUnitList</a> (on page 768)
<b>start_date</b>	string( <i>date</i> )
	<b>example</b> 2012-02-21
	<b>description</b> The start date. The field is optional.
<b>end_date</b>	string( <i>date</i> )
	<b>example</b> 2012-02-21
	<b>description</b> The end date. The field is optional.
<b>originalSource</b>	object
	<b>description</b> Contains the original source system details. The system and code that corresponds to the original source system of the note. The external reference of the original source system is <a href="http://wcm/originalsourcecode">http://wcm/originalsourcecode</a> . The field is optional.

**\$ref** [ExternalFeesSource \(on page 769\)](#)

**source** object

**description** Contains the source details. The system and code that corresponds to the source of the note. The external reference of the original system is <http://wcm/sourcecode>. The field is optional.

**\$ref** [ExternalFeesSource \(on page 769\)](#)

**type** object

## ModifiedFeeInfo

### Properties

**messageID** integer(*int64*)

**example** 1552641913250

**description** The internal record ID for a location. The field is optional.

**id** string

**example** extFeeESR1

**description** The unique identifier of the location. The field is mandatory.

**minLength** 0

**maxLength** 20

**organization\_id** string

**example** extOrgID466000

**description** The reference identifier for an organization. The field is mandatory.

**minLength** 0

**maxLength** 20

**service\_id** string

**example** extServiceID466000

**description**

The service identifier for a location. The field is mandatory.

**minLength** 0

**maxLength** 20

**fees** string(*money*)

**description**

The fee for the service. The field is mandatory.

**unit** \$ref [ModifiedUnitList](#)

(*on page 768*)

**start\_date** string(*date*)

**example** 2012-02-21

**description**

The start date. The field is optional.

**end\_date** string(*date*)

**example** 2012-02-21

**description**

The end date. The field is optional.

**type** object

## UpdateFeeResponse

### Properties

**message** string

**example** OK

**description**

The response message from the API.

**entries** array

**description**

The list of fee details.

**uniqueItems** true

**items** \$ref [ModifiedFeeInfo](#)

(*on page 766*)

**type** object

## NewUnitList

### Properties

**id** string

**example** extFeeUnitESR1

**description** The unique identifier of a category. The field is mandatory.

**maxLength** 20

**name** string

**example** ext unit name

**description** The name of the unit. The field is mandatory.

**maxLength** 2000

**type** object

## ModifiedUnitList

### Properties

**id** string

**example** extFeeUnitESR1

**description** The unique identifier of a category. The field is mandatory.

**maxLength** 20

**name** string

**example** ext unit name updated

**description** The name of the unit. The field is mandatory.

**maxLength** 2000

**type** object

## ExternalFeesSource

### Properties

**text** string

**example** Acme Systems

**description**  
Source details

**maxLength** 100

**coding** \$ref [SourceCoding](#)

(*on page*  
770)

**type** object

## DeleteFeeDetails

### Properties

**messageID** integer(*int64*)

**example** 1552641913250

**description**  
The internal record ID for reference. The field is optional.

**id** string

**example** extLocationESR1

**description**  
The unique identifier of the fee service. The field is mandatory.

**minLength** 0

**maxLength** 20

**organization\_id** string

**example** extOrgID466000

**description**  
The reference identifier for an organization. The field is mandatory.

**minLength** 0

**maxLength** 20

**service\_id** string

**example** extServiceID466000

**description**

The service identifier for a location. The field is mandatory.

**minLength** 0

**maxLength** 20

**type** object

## SourceCoding

### Properties

**system** string

**example** http://wcm/originalsource

**description**

The FHIR system details.

**maxLength** 100

**code** string

**example** ExtSS466001

**description**

The FHIR code reference details.

**maxLength** 100

**type** object

## ActionCountResponse

### Properties

**successCount** integer(*int32*)

**example** 8

**description**

The success count.

**failureCount** integer(*int32*)

**example** 2

**description**

The failure count.

**totalCount** integer(*int32*)

**example** 10

**description**

The total number  
of entries.

**type** object

## DefaultModelError

### Properties

**Error** array

**items \$ref** [Error \(on](#)

[page](#)

[771\)](#)

**type** object

## Error

### Properties

**code** integer(*int32*)

**description**

A machine-readable code that identifies the problem. This code does not vary with the Accept-Language setting.

**message** string

**description**

A human-readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text can change over time.

**level** string

**description**

The level of the error.

**type** object

**required**

- code
- message
- level

## Inquiries API

Version:v1

By using the protected APIs that follow, you can retrieve provider service inquiries created for a client from WCM so that extended care team members (who are not Watson Care Manager users) can view and manage the inquiry in an external system. In addition, you can send updated inquiries from an external system to Watson Care Manager.

### Servers

<https://host/Rest>

### API methods: Get inquiry (by ID)

**GET /v1/ees/inquiry/{id}**

Get provider service inquiry details for a client who is registered in Watson Care Manager.

Retrieves a specific inquiry in Watson Care Manager that matches the record ID sent from an external system. **Example request**

cURL

```
curl GET -v -k -H
'Content-Type: application/json' -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H
"Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H 'Referer: curam//foundational.app'
http://host:port/Rest/v1/ees/inquiry/{id}
```

JAVA

```
HttpResponse response = Unirest.put("https://host:port/Rest/v1/ees/inquiry/{id}")
    .header("accept", "application/json")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("Referer", "curam://foundationalapp") .asString();
```

## Parameters

### **Referer**(*header*)

**type** string  
**array** curam://foundational.app  
**required** true

### **X-WCM-TENANT-ID**(*header*)

**type** string  
**array** The tenant ID.  
**required** true

### **X-WCM-TENANT-INSTANCE**(*header*)

**type** string  
**array** The tenant instance.  
**required** true

### **Authorization**(*header*)

**type** string  
**array** The Access Token.  
**required** true

### **X-GRANT-TYPE**(*header*)

**type** string  
**array** client\_credentials

**required** true

**id**(*path*)

Internal record ID/WCM ID of the inquiry.

**type** string

**required** true

## Responses

**200**

The get request was successful.

**Media types**

**application/json**

**Schema** [GetInquiryMessage](#)

(*on page 779*)

**400**

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

Possible error messages:

EESERR2056 - Inquiry not found.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

(*on page 782*)

**500**

An internal server error occurred. Contact your administrator for more information.

**Media types**

**application/json**

**Schema DefaultErrorModel**  
*(on page 782)*

**default**

An unexpected error occurred. Check the error message for further information.

**Media types**

**application/json**

**Schema DefaultErrorModel**  
*(on page 782)*

## API methods: Update inquiry

### PUT /v1/ees/inquiry

Update a provider service inquiry for a client who is registered in Watson Care Manager.

Updates a specific inquiry in Watson Care Manager. Watson Care Manager identifies the record to be updated based on the inquiry identifiers that the external system provides in the body.

CURL

```
curl -X POST "https://host:port/Rest/v1/ees/inquiry" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Content-Type: application/json" -d " { \"resourceType\": \"Parameters\", \"parameter\": [ {\"name\": \"inquiry\", \"resource\": { \"resourceType\": \"Parameters\", \"implicitRules\": \"Inquiry\", \"id\": \"1126999418470656\", \"parameter\": [ { \"name\": \"ExpectedStartDate\", \"valueString\": \"2021-09-10\" }, { \"name\": \"Status\", \"valueString\": \"openesr\" }, { \"name\": \"ReceivedDate\", \"valueString\": \"2020-10-29\" }, { \"name\": \"LastUpdatedBy\", \"valueString\": \"Susan Brown\" }, { \"name\": \"LastUpdated\", \"valueString\": \"2021-05-29T12:43:45+02:00\" }, { \"name\": \"Comments\", \"valueString\": \"update Comment\" } ], { \"name\": \"Source\", \"valueString\": \"\", \"valueCodelableConcept\": { \"text\": \"description of source\", \"coding\": [ { \"system\": \"http://wcm/source\", \"code\": \"code of source\" } ] } }, { \"name\": \"OriginalSource\", \"valueString\": \"\", \"valueCodelableConcept\": { \"text\": \"description of original source\", \"coding\": [ { \"system\": \"http://wcm/originalsource\", \"code\": \"code of original source\" } ] } } ] } }
```

JAVA

```
HttpResponse response = Unirest.post("https://host:port/Rest/v1/ees/inquiry")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .header("Referer", "curam://foundational.app")
    .header("Content-Type", "application/json")

    .asString();
```

## Parameters

### **Referer(header)**

**type** string  
**array** curam://foundational.app  
**required** true

### **X-WCM-TENANT-ID(header)**

**type** string  
**array** The tenant ID.  
**required** true

### **X-WCM-TENANT-INSTANCE(header)**

**type** string  
**array** The tenant instance.  
**required** true

### **Authorization(header)**

**type** string  
**array** The Access Token.

**required** true

**X-GRANT-TYPE**(*header*)

**type** string

**array** client\_credentials

**required** true

## Request body

The inquiry details.

**Required:**true

**Media types**

application/json

**Schema** [ModifiedInquiry](#)

(*on page*  
779)

## Responses

**200**

The put request was successful.

**Media types**

application/json

**Schema** [ModifiedInquiry](#)

(*on page*  
779)

**400**

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

Possible error messages:

EESERR2051 - It is mandatory to specify 'inquiry ID'. EESERR2052 - It is mandatory to specify 'status'. EESERR2054 - It is mandatory to specify 'last updatedBy'. EESERR2055 - It is mandatory

to specify 'last updated'. EESERR2056 - Inquiry not found. EESERR2057 - The value string entered for 'Inquiry ID' is too long, maximum allowed characters is 18. EESERR2058 - Invalid value entered for 'status'. EESERR2059 - The value string entered for 'status' is too long, maximum allowed characters is 20. EESERR2060 - The value string entered for 'Comments' is too long, maximum allowed characters is 2000. EESERR2061 - The 'source' entered is too long, maximum allowed is 100. EESERR2062 - The 'originalSource' entered is too long, maximum allowed is 100. EESERR2063 - Invalid 'system' entered for 'source'. EESERR2064 - Invalid 'code' entered for 'source'. EESERR2065 - Invalid 'system' entered for 'originalSource'. EESERR2066 - Invalid 'code' entered for 'originalSource'. EESERR2067 - Invalid date string entered for 'expectedStartDate'. EESERR2068 - Invalid date string entered for 'receivedDate'. EESERR2069 - The value string entered for 'lastUpdatedBy' is too long, maximum allowed characters is 64. EESERR2070 - Invalid 'Date Time' entered for 'lastUpdated'. EESERR2071 - Invalid 'value' entered for 'ResourceType'. EESERR2072 - Invalid 'value' entered for 'Parameter Name'. EESERR2073 - Invalid 'value' entered for 'implicitRules'.

#### **Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 782](#))

#### **500**

An internal server error occurred. Contact your administrator for more information.

#### **Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 782](#))

#### **default**

An unexpected error occurred. Check the error message for further information.

#### **Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 782](#))

## Components

### Schemas

#### **GetInquiryMessage**

##### **Properties**

**resourceType** string

**description**

All inquiries are of resource type Parameters.

**parameter** object

**description**

Parameter of inquiry response holds inquiry details.

**\$ref**

[ModifiedParameter \(on page 779\)](#)

**type** object

#### **ModifiedInquiry**

##### **Properties**

**resourceType** string

**description**

All inquiries are of resource type Parameters. This is a mandatory field.

**maxLength** 300

**parameter** object

**description**

Contains the inquiry details. This is a mandatory field.

**\$ref**

[ModifiedParameter \(on page 779\)](#)

**type** object

#### **ModifiedParameter**

##### **Properties**

**name** string

**description**

All inquiries parameter are of name inquiry. This is a mandatory field.

**maxLength** 300

**resource** object

**description**

Mandatory. This object holds the resource for the Parameter.

**\$ref** [ModifiedResource \(on page 780\)](#)

**type** object

## ModifiedResource

### Properties

**resourceType** string

**description**

All inquiries are of resource type Parameters. This is a mandatory field.

**maxLength** 300

**implicitRules** string

**description**

All implicitRules are Inquiry. This is a mandatory field.

**maxLength** 300

**id** string

**description**

Identifier to retrieve the inquiry to update. This is a mandatory field.

**maxLength** 18

**parameter** array

**items \$ref** [ModifiedParameters](#)

*(on page 781)*

**type** object

## ModifiedParameters

### Properties

<b>name</b>	string
	<b>description</b> This attribute holds the name for the Parameter. List of Mandatory names for PUT Rest call are Status LastUpdatedBy and LastUpdated. list of optional names are ExpectedStartDate ReceivedDate Comments Source OriginalSource .
	<b>maxLength</b> 2000
<b>valueString</b>	string
	<b>description</b> This attribute holds the value for the Parameter. List of Mandatory values for PUT Rest call are Status LastUpdatedBy and LastUpdated. list of optional names are ExpectedStartDate ReceivedDate Comments Source OriginalSource .
	<b>maxLength</b> 2000

**valueCodableConcept** object

<b>description</b>	Object to hold source and original source details.
<b>\$ref</b>	<a href="#">Sources (on page 781)</a>

**type** object

## Sources

### Properties

<b>text</b>	string
	<b>maxLength</b> 100
<b>coding</b>	object
	<b>description</b> Mandatory. This object holds the resource for the Parameter.
<b>\$ref</b>	<a href="#">ModifiedCoding (on page 782)</a>

**type** object

## ModifiedCoding

### Properties

**system** string

**maxLength** 100

**code** string

**maxLength** 100

**type** object

## DefaultModelError

### Properties

**Error** array

**items \$ref** Error (*on*

*page*

782)

**type** object

## Error

### Properties

**code** integer(*int32*)

#### **description**

A machine-readable code that identifies the problem. This code does not vary with the Accept-Language setting.

**message** string

#### **description**

A human-readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text may change over time.

**level** string

**description**

The level of the error.

**type** object

**required**

- code
- message
- level

## (External Provider) Location API

Version:1.0

By using the protected APIs that follow, you can create, update, or delete provider location records in Watson Care Manager so that Watson Care Manager accurately reflects the external system data. When a location is created, an external identifier is provided as part of the API. The identifier is then used to identify the location whose records are to be updated or closed. The location records that the API creates are read-only in the Watson Care Manager Tenant Administration application.

A location can be associated with a provider. For example, the location of an organization's headquarters. If only the provider identifier is provided, only the location is associated with the provider. A location can be associated with a provider and a service offering for that provider. For example, the location where a service is offered, such as a food bank. If the provider external identifier and the service external identifier are provided, the location is associated with the provider and the service offering.

you@your-company.com

### Servers

`http://host/Rest https://host/Rest`

### API methods: Location

#### POST /v1/epa/location

Create location records for providers and provider service offerings in Watson Care Manager.

Creates location records for providers and provider service offerings based on an update in the external system that initiates a transfer of valid data to Watson Care Manager. Watson Care Manager identifies the

record to update based on the provider ID and service ID (if applicable) that the external system provides in the path and the body.

## CURL

```
curl -X POST "https://host:port/Rest/v1/epa/location" -H "accept: application/json" -H "Content-Type: application/json" -d " { "messageID" : "123", "id" : "extLocationESR1", "organization_id": "extProvider466000", "service_id": "extService466000", "address_1": "1645 Corinth Ave # 201", "city": "Los Angeles", "state_province": "CA", "postal_code": "90021", "country": "US", "location": { "id": "extGeoCodeRef1", "latitude": "", "longitude": "" }, "source": { "coding": [{ "system": "http://wcm/source", "code": "ExtSS466000" }], "text": "Acme Systems" }, "originalSource": { "coding": [{ "system": "http://wcm/originalsource", "code": "ExtSS466001" }], "text": "Acme Systems" } } "
```

## JAVA

```
HttpResponse response = Unirest.post("https://host:port/Rest/v1/epa/location")
    .header("accept", "application/json")
    .header("Content-Type", "application/json")
    .body(" { "messageID" : "123", "id" : "extLocationESR1", "organization_id": "extProvider466000", "service_id": "extService466000", "address_1": "1645 Corinth Ave # 201", "city": "Los Angeles", "state_province": "CA", "postal_code": "90021", "country": "US", "location": { "id": "extGeoCodeRef1", "latitude": "", "longitude": "" }, "source": { "coding": [{ "system": "http://wcm/source", "code": "ExtSS466000" }], "text": "Acme Systems" }, "originalSource": { "coding": [{ "system": "http://wcm/originalsource", "code": "ExtSS466001" }], "text": "Acme Systems" } } ")
    .asString();
```

**Parameters****body**(*body*)

**The request body in the JSON format.**

**Schema:** [NewLocationInfo \(on page 789\)](#)

**required**true

**Responses**

**201**

The post request was successful.

### Headers

Name	Description	Schema
Location	The location of the new resource.	<b>type</b> string

### 400

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

The following list outlines the possible error messages: EPAERR3401 - The location ID is invalid. EPAERR3402 - The location ID exists. EPAERR3403 - It is mandatory to specify 'address\_1'. EPAERR3405 - It is mandatory to specify 'city'. EPAERR3407 - It is mandatory to specify 'state\_province'. EPAERR3409 - It is mandatory to specify 'postal\_code'. EPAERR3411 - It is mandatory to specify 'country'. EPAERR3404 - The 'address\_1' entered is too long. The maximum characters that is allowed is 65. EPAERR3406 - The 'city' entered is too long. The maximum characters that is allowed is 256. EPAERR3412 - The 'country' entered is too long. The maximum characters that is allowed is 20. EPAERR3410 - The 'postal\_code' entered is too long. The maximum characters that is allowed is 100. EPAERR3408 - The 'state\_province' entered is too long. The maximum characters that is allowed is 256.

### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

(*on page 797*)

### 500

An internal server error occurred. Contact your administrator for more information.

### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

(*on page 797*)

### default

An unexpected error occurred. Check the error message for further information.

**Media types****application/json****Schema DefaultErrorModel***(on page 797)***PUT /v1/epa/location**

Update location records for providers and provider service offerings in Watson Care Manager.

Updates location records for providers and provider service offerings based on an update in the external system that initiates a transfer of valid data to Watson Care Manager. Watson Care Manager identifies the record to update based on the provider ID and service ID (if applicable) that the external system provides in the path and the body.

## cURL

```
curl -X POST "https://host:port/Rest/v1/epa/location" -H "accept: application/json" -H "Content-Type: application/json" -d " { "messageID" : "123", "id" : "extLocationESR1", "organization_id": "extProvider466000", "service_id": "extService466000", "address_1": "1645 Corinth Ave # 202", "city": "Los Angeles", "state_province": "CA", "postal_code": "90021", "country": "US", "location": { "id": "extGeoCodeRef1", "latitude": "", "longitude": "" } }
```

## JAVA

```
HttpResponse response = Unirest.post("https://host:port/Rest/v1/epa/location")
    .header("accept", "application/json")
    .header("Content-Type", "application/json")
    .body(" { "messageID" : "123", "id" : "extLocationESR1", "organization_id": "extProvider466000", "service_id": "extService466000", "address_1": "1645 Corinth Ave # 202", "city": "Los Angeles", "state_province": "CA", "postal_code": "90021", "country": "US", "location": { "id": "extGeoCodeRef1", "latitude": "", "longitude": "" } } ")
    .asString();
```

**Parameters****body**(*body*)

**The request body in the JSON format.**

**Schema:** [ModifiedLocationInfo \(on page 791\)](#)

**required** true

## Responses

### 200

The put request was successful.

#### Media types

**application/json**

**Schema** [UpdateLocationResponse](#)

*(on page 796)*

### 400

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

The following list outlines the possible error messages: EPAERR3401 - The location ID is invalid. EPAERR3402 - The location ID exists. EPAERR3403 - It is mandatory to specify 'address\_1'. EPAERR3405 - It is mandatory to specify 'city'. EPAERR3407 - It is mandatory to specify 'state\_province'. EPAERR3409 - It is mandatory to specify 'postal\_code'. EPAERR3411 - It is mandatory to specify 'country'. EPAERR3404 - The 'address\_1' entered is too long. The maximum characters that is allowed is 65. EPAERR3406 - The 'city' entered is too long. The maximum characters that is allowed is 256. EPAERR3412 - The 'country' entered is too long. The maximum characters that is allowed is 20. EPAERR3410 - The 'postal\_code' entered is too long. The maximum characters that is allowed is 100. EPAERR3408 - The 'state\_province' entered is too long. The maximum characters that is allowed is 256.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 797)*

### 500

An internal server error occurred. Contact your administrator for more information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 797](#))

**default**

An unexpected error occurred. Check the error message for further information.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 797](#))

## POST /v1/epa/location/close

Delete location records for providers and provider service offerings in Watson Care Manager.

```
cURL curl -X POST "https://host:port/Rest/v1/epa/location/close" -H "accept: application/json" -H "Content-Type: application/json" -d " { \"messageID\" : \"123\", \"id\" : \"extLocationESR1\", \"organization_id\": \"extProvider466000\", \"service_id\": \"extService466000\"} " JAVA HttpResponse
response = Unirest.post("https://host:port/Rest/v1/epa/location/close") .header("accept", "application/json") .header("Content-Type", "application/json") .body(" { \"messageID\" : \"123\", \"id\" : \"extLocationESR1\", \"organization_id\": \"extProvider466000\", \"service_id\": \"extService466000\"} ") .asString();
```

### Parameters

**locationID**(*body*)

**The JSON object that contains the location ID..**

**Schema:** [DeleteLocation](#) ([on page 796](#))

**required** true

### Responses

**200**

The post request was successful.

**Media types**

**application/json**

**Schema type** array

**items \$ref** [ActionCountResponse](#)

([on page 797](#))

## 500

An internal server error occurred. Contact your administrator for more information.

**Media types**

**application/json**

**Schema** [DefaultModelError](#)

([on page 797](#))

## default

An unexpected error occurred. Check the error message for further information.

**Media types**

**application/json**

**Schema** [DefaultModelError](#)

([on page 797](#))

## Components

### Schemas

#### NewLocationInfo

**Properties**

**messageID** integer(*int64*)

**example** 1552641913250

**description**

The internal record ID for a location. The field is optional.

**id** string

**example** extLocationESR1

**description**

The unique identifier of the location. The field is mandatory.

**minLength** 0

**maxLength** 20

**organization\_id** string

**example** extOrgID466000

**description**

The reference identifier for an organization. The field is mandatory.

**minLength** 0

**maxLength** 20

**service\_id** string

**example** extServiceID466000

**description**

The service identifier for a location. The field is optional.

**minLength** 0

**maxLength** 20

**address\_1** \$ref[NewAddressLocation](#)

(on page 793)

**city** string

**example** Los Angeles

**description**

The name of the city. The field is mandatory.

**maxLength** 100

**minLength** 0

**state\_province** string

**example** CA

**description**

The name of the state. The field is mandatory.

**postal\_code** string

**example** 90021

<b>description</b>	The location PINCODE.
<b>maxLength</b>	100
<b>country</b>	string
<b>example</b>	US
<b>description</b>	The name of the country. The field is mandatory.
<b>location</b>	object
<b>description</b>	The field that specifies the location coordinates.
<b>\$ref</b>	<a href="#">ExternalGeoLocation (on page 794)</a>
<b>originalSource</b>	object
<b>description</b>	Contains the original source system details. The system and code that corresponds to the original source system of the note. The external system reference of the original source system is <a href="http://wcm/originalsourcecode">http://wcm/originalsourcecode</a> . The field is optional.
<b>\$ref</b>	<a href="#">LocationSource (on page 794)</a>
<b>source</b>	object
<b>description</b>	Contains the source details. The system and code that corresponds to the source of the note. The external system reference of the source is <a href="http://wcm/sourcecode">http://wcm/sourcecode</a> . The field is optional.
<b>\$ref</b>	<a href="#">LocationSource (on page 794)</a>
<b>type</b>	object

## ModifiedLocationInfo

### Properties

<b>messageID</b>	integer( <i>int64</i> )
<b>example</b>	1552641913250

**description**

The internal record ID for a location. The field is optional.

**id**

string

**example** extLocationESR1

**description**

The unique identifier of the location. The field is mandatory.

**minLength** 0

**maxLength** 20

**organization\_id** string

**example** extOrgID466000

**description**

The reference identifier for an organization. The field is mandatory.

**minLength** 0

**maxLength** 20

**service\_id**

string

**example** extServiceID466000

**description**

The service identifier for a location. The field is optional.

**minLength** 0

**maxLength** 20

**address\_1**

\$ref [ModifiedAddressLocation](#)

*(on page 793)*

**city**

string

**example** Los Angeles

**description**

The name of the city. The field is mandatory.

**minLength** 0

**maxLength** 100

**state\_province** string

**example** CA

**description**  
The name of the state. The field is mandatory.

**minLength** 0  
**maxLength** 256

**postal\_code** string

**example** 90021

**description**  
The location PINCODE. The field is mandatory.

**minLength** 0  
**maxLength** 100

**country** string

**example** US

**description**  
The name of the country. The field is mandatory.

**minLength** 0  
**maxLength** 20

**location** object

**description**  
The field that specifies the location coordinates.

**\$ref** [ExternalGeoLocation \(on page 794\)](#)

**type** object

## NewAddressLocation

**type** string

**example** 1645 Corinth Ave # 201

**description**  
The address field. The field is mandatory.

**minLength** 0  
**maxLength** 65

## ModifiedAddressLocation

**type** string

**example** 136 Corinth Ave # 202

**description**

The address field. The field is mandatory.

**minLength** 0

**maxLength** 65

## ExternalGeoLocation

### Properties

**id** string

**example** extGeoCodeRef1

**description**

The unique identifier for an external geolocation. The field is mandatory.

**minLength** 0

**maxLength** 20

**latitude** number

**example** double

**description**

The latitude coordinates. The field is optional.

**longitude** number(double)

**description**

The longitude coordinates. The field is optional.

**type** object

## LocationSource

### Properties

**text** string

**example** Acme Systems

**description**

The source details.

**minLength** 0

**maxLength** 100

**coding \$ref** [SourceCoding](#)

(*on page*  
795)

**type** object

## SourceCoding

### Properties

**system** string

**example** http://wcm/originalsource

**description**  
The FHIR system details.

**minLength** 0

**maxLength** 100

**code** string

**example** ExtSS466001

**description**  
The FHIR code reference  
details.

**minLength** 0

**maxLength** 100

**type** object

## GenericResponse

### Properties

**message** string

**example** OK

**description**  
The response message from the API.

**type** object

## UpdateLocationResponse

### Properties

**message** string

**example** OK

**description** Response message from API.

**entries** array

**description** The list of locations.

**uniqueItems** true

**items** \$ref [ModifiedLocationInfo](#)

(on page 791)

**type** object

## DeleteLocation

### Properties

**messageID** integer(*int64*)

**example** 1552641913250

**description** The internal record ID for a location. The field is optional.

**id** string

**example** extLocationESR1

**description** The unique identifier of the location. The field is mandatory.

**minLength** 0

**maxLength** 20

**organization\_id** string

**example** extOrgID466000

**description**

The reference identifier for an organization. The field is mandatory.

**minLength** 0

**maxLength** 20

**service\_id**

string

**example** extServiceID466000

**description**

The service identifier for a location. The field is optional.

**minLength** 0

**maxLength** 20

**type** object

**ActionCountResponse****Properties****successCount** integer(*int32*)

**example** 8

**description**

The success count.

**failureCount** integer(*int32*)

**example** 2

**description**

The failure count.

**totalCount** integer(*int32*)

**example** 10

**description**

The total number  
of entries.

**type** object

**DefaultModelError****Properties**

## Error array

```
items $ref Error (on
  page
  798)
```

**type** object

## Error

### Properties

**code** integer(int32)

#### description

A machine-readable code that identifies the problem. This code does not vary with the Accept-Language setting.

**message** string

#### description

A human-readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text can change over time.

**level** string

#### description

The level of the error.

**type** object

### required

- code
- message
- level

## (External Provider) Provider API

Version:1.0

By using the protected APIs that follow, you can create, update, or close provider records in Watson Care Manager so that Watson Care Manager accurately reflects the external system data. When a provider is created, an external identifier is provided as part of the API. The identifier is then used to identify the

provider whose records are to be updated or closed. For example, an external registry can send a copy of their community service providers to Watson Care Manager. By default, the provider data is set to active and is available for care team members to access and to add to individuals' plans. The provider records that the API creates are read-only in the Watson Care Manager Tenant Administration application.

you@your-company.com

## Servers

`http://host/Rest https://host/Rest`

## API methods: Provider

### POST /v1/epa/provider

Create a provider in Watson Care Manager.

```
cURL curl -X POST "https://host:port/Rest/v1/epa/provider" -H "accept: application/json" -H "Content-Type: application/json" -d " { "messageID" : "123", "id" : "extProviderESR1", "name": "ext provider1 name", "description": "ext provider1 desc", "email": "extprovider1@example.com", "url": "http://www.extprovider1.com", "source": { "coding": [{ "system": "http://wcm/source", "code": "ExtSS466000" }], "text": "Acme Systems" }, "originalSource": { "coding": [{ "system": "http://wcm/originalsource", "code": "ExtSS466001" }], "text": "Acme Systems" } } " JAVA HttpResponse response = Unirest.post("https://host:port/Rest/v1/epa/provider") .header("accept", "application/json") .header("Content-Type", "application/json") .body(" { "messageID" : "123", "id" : "extProviderESR1", "name": "ext provider1 name", "description": "ext provider1 desc", "email": "extprovider1@example.com", "url": "http://www.extprovider1.com", "source": { "coding": [{ "system": "http://wcm/source", "code": "ExtSS466000" }], "text": "Acme Systems" }, "originalSource": { "coding": [{ "system": "http://wcm/originalsource", "code": "ExtSS466001" }], "text": "Acme Systems" } } ") .asString();
```

## Parameters

**body**(*body*)

**The request body in the JSON format.**

**Schema:** [NewProviderInfo \(on page 804\)](#)

**required**true

## Responses

**201**

The post request was successful.

### Headers

Name	Description	Schema
Location	The location of the new resource.	<b>type</b> string

### 400

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

The following list outlines the possible error messages: EPAERR3101 - It is mandatory to specify 'name'. EPAERR3102 - The 'name' entered is too small. The minimum characters that is allowed is 3. EPAERR3103 - The 'name' entered is too long. The maximum characters that is allowed is 100. EPAERR3104 - It is mandatory to specify 'description'. EPAERR3105 - The 'description' entered is too small. The minimum characters that is allowed is 3. EPAERR3106 - The 'description' entered is too long. The maximum characters that is allowed is 2000. EPAERR3107 - The 'source' entered is too long. The maximum characters that is allowed is 100. EPAERR3108 - The 'originalSource' entered is too long. The maximum characters that is allowed is 100. Invalid provider ID. EPAERR3110 - The provider ID exists. EPAERR3111 - The 'reason' entered is too long. The maximum characters that is allowed is 2000.

### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

(*on page 810*)

### 500

An internal server error occurred. Contact your administrator for more information.

### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

(*on page 810*)

### default

An unexpected error occurred. Check the error message for further information.

**Media types****application/json****Schema** [DefaultErrorModel](#)

(on page 810)

**PUT /v1/epa/provider**

Update a provider in Watson Care Manager.

```
cURL curl -X POST "https://host:port/Rest/v1/epa/provider" -H "accept: application/json" -H
"Content-Type: application/json"-d " { "messageID" : "123", "id" : "extProviderESR1", "name": "ext
provder1 name", "description": "ext provder1 desc", "email": "extprovider1@example.com", "url":
"http://www.extprovider1.com"} " JAVA HttpResponse response = Unirest.post("https://host:port/
Rest/v1/epa/provider") .header("accept", "application/json") .header("Content-Type", "application/
json") .body(" { "messageID" : "123", "id" : "extProviderESR1", "name": "ext provder1 name", "description":
"ext provder1 desc", "email": "extprovider1@example.com", "url": "http://www.extprovider1.com"}
") .asString();
```

**Parameters****body**(*body*)

The request body in the JSON format.

**Schema:** [ModifiedProviderInfo](#) (on page 806)

**required**true

**Responses****200**

The put request was successful.

**Media types****application/json****Schema** [UpdateProviderResponse](#)

(on page 808)

**400**

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

The following list outlines the possible error messages: EPAERR3101 - It is mandatory to specify 'name'. EPAERR3102 - The 'name' entered is too small. The minimum characters that is allowed is 3. EPAERR3103 - The 'name' entered is too long. The maximum characters that is allowed is 100. EPAERR3104 - It is mandatory to specify 'description'. EPAERR3105 - The 'description' entered is too small. The minimum characters that is allowed is 3. EPAERR3106 - The 'description' entered is too long. The maximum characters that is allowed is 2000. EPAERR3107 - The 'source' entered is too long. The maximum characters that is allowed is 100. EPAERR3108 - The 'originalSource' entered is too long. The maximum characters that is allowed is 100. Invalid provider ID. EPAERR3110 - The provider ID exists. EPAERR3111 - The 'reason' entered is too long. The maximum characters that is allowed is 2000.

#### **Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 810)*

#### **500**

An internal server error occurred. Contact your administrator for more information.

#### **Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 810)*

#### **default**

An unexpected error occurred. Check the error message for further information.

#### **Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 810)*

## POST /v1/epa/provider/close

Close a provider in Watson Care Manager.

```
cURL curl -X POST "https://host:port/Rest/v1/epa/provider/close" -H "accept: application/json"
-H "Content-Type: application/json" -d " { "messageID" : "123", "id" : "extProviderESR1", "end_date" :
"2021-04-09", "reason" : "some reason" } " JAVA HttpResponse response = Unirest.post("https://host:port/
Rest/v1/epa/provider/close") .header("accept", "application/json") .header("Content-Type", "application/
json") .body(" { "messageID" : "123", "id" : "extProviderESR1", "end_date" : "2021-04-09", "reason" : "some
reason" } ") .asString();
```

### Parameters

**providerID**(*body*)

**The JSON object that contains the reference ID of a provider..**

**Schema:** [DeleteProvider \(on page 808\)](#)

**required** true

### Responses

**200**

The post request was successful.

#### Media types

**application/json**

**Schema type** array

**items \$ref** [ActionCountResponse](#)

*(on page 810)*

**400**

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

The following list outlines the possible error messages: EPAERR3111 - The 'reason' entered is too long. The maximum characters that is allowed is 2000.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 810)*

**500**

An internal server error occurred. Contact your administrator for more information.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 810)*

**default**

An unexpected error occurred. Check the error message for further information.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 810)*

## Components

### Schemas

#### NewProviderInfo

**Properties**

**messageID** integer(*int64*)

**example** 1552641913250

**description**  
The internal record ID for a provider. The field is mandatory.

**id** string

**example** extProviderESR1

**description**  
The unique identifier of a provider. The field is mandatory.

**minLength** 0

	<b>maxLength</b> 20
<b>name</b>	\$ref <a href="#">NewProviderName</a> <i>(on page 807)</i>
<b>description</b>	string
	<b>example</b> ext provider description
	<b>description</b> The provider description. The field is mandatory.
	<b>minLength</b> 3
	<b>maxLength</b> 2000
<b>email</b>	string
	<b>example</b> extProvider1@example.com
	<b>description</b> The email ID of the provider member. The field is optional.
	<b>minLength</b> 0
	<b>maxLength</b> 100
<b>url</b>	string
	<b>example</b> http://www.extprovider1.com
	<b>description</b> The URL for the provider. The field is optional.
	<b>minLength</b> 0
	<b>maxLength</b> 100
<b>originalSource</b> object	
	<b>description</b> Contains the original source system details. The system and code that corresponds to the original source system of the note. The external system reference of the original source system is http://wcm/originalsourcecode. The field is optional.
	<b>\$ref</b> <a href="#">ExternalProviderSource</a> <i>(on page 807)</i>
<b>source</b>	object
	<b>description</b> Contains the source details. The system and code that corresponds to the source of the note. The external system

reference of the source is `http://wcm/sourcecode`. The field is a optional.

**\$ref** [ExternalProviderSource \(on page 807\)](#)

**type** object

## ModifiedProviderInfo

### Properties

**messageID** integer(*int64*)

**example** 1552641913250

**description** The internal record ID for a provider. The field is mandatory.

**id** string

**example** extProviderESR1

**description** The unique identifier of a provider. The field is mandatory.

**minLength** 0

**maxLength** 20

**name** [\\$ref ModifiedProviderName \(on page 807\)](#)

**description** string

**example** ext provider description

**description** The provider description. The field is mandatory.

**minLength** 3

**maxLength** 2000

**email** string

**example** extProvider1@example.com

**description** The email ID of the provider member. The field is optional.

**minLength** 0

**maxLength** 100

**url** string

**example** http://www.extprovider1.com

**description** The URL for the provider. The field is optional.

**minLength** 0

**maxLength** 100

**type** object

## NewProviderName

**type** string

**example** ext provider1 name

**description** The name of the provider. The field is mandatory.

**minLength** 3

**maxLength** 100

## ModifiedProviderName

**type** string

**example** ext provider name updated

**description** The name of the provider. The field is mandatory.

**minLength** 3

**maxLength** 100

## ExternalProviderSource

### Properties

**text** string

**example** Acme Systems

**description** The source details.

**maxLength** 100

**coding** \$ref [SourceCoding](#)

*(on page  
809)*

**type** object

## UpdateProviderResponse

### Properties

**message** string

**example** OK

**description** The response message from the API.

**entries** array

**description** The list of providers.

**uniqueItems** true

**items** \$ref [ModifiedProviderInfo](#)  
(*on page 806*)

**type** object

## DeleteProvider

### Properties

**messageID** integer(*int64*)

**example** 1552641913250

**description** The internal record ID for a provider. This field is mandatory.

**id** string

**example** extProviderESR1

**description** The unique identifier of a provider. The field is mandatory.

**minLength** 0

**maxLength** 20

**end\_date** string(*date*)

**example** 2021-04-09

**minLength** 0

**description**

The end date of the provider. The field is optional.

**reason** string

**example** No longer needed.

**description**

The reason to delete the provider details. The field is optional.

**minLength** 0

**maxLength** 2000

**type** object

**SourceCoding****Properties**

**system** string

**example** http://wcm/originalsource

**description**

The FHIR system details.

**maxLength** 100

**code** string

**example** ExtSS466001

**description**

The FHIR code reference details.

**maxLength** 100

**type** object

**GenericResponse****Properties**

**message** string

**example** OK

**description**

The response message from the API.

**type** object

## ActionCountResponse

### Properties

**successCount** integer(*int32*)

**example** 8

**description**  
The success count.

**failureCount** integer(*int32*)

**example** 2

**description**  
The failure count.

**totalCount** integer(*int32*)

**example** 10

**description**  
The total number  
of entries.

**type** object

## DefaultErrorModel

### Properties

**Error** array

**items** \$ref [Error \(on page 810\)](#)

**type** object

## Error

### Properties

**code** integer(*int32*)

**description**

A machine-readable code that identifies the problem. The code does not vary with the Accept-Language setting.

**message** string**description**

A human-readable message. The message text is localized based on the Accept-Language setting of the request. The contents of the message text can change over time.

**level** string**description**

The level of the error.

**type** object**required**

- code
- message
- level

## (External Provider) Service API

Version:1.0

By using the protected APIs that follow, you can create, update, close, or reopen provider service offering records in Watson Care Manager so that Watson Care Manager accurately reflects the external system data. When a service is created, an external identifier is provided as part of the API. The identifier is then used to identify the service whose records require updating, closing, or reopening. The provider's external identifier must also be included to identify the provider service record to create, update, close, or reopen. For example, an external registry can send newly offered services for providers to Watson Care Manager. By default, the services are set to active and are then available for care team members to access and to add to individuals' plans. The service offerings that the API creates are read-only in the Watson Care Manager Tenant Administration application.

As part of the API, the service and category attributes are added to the service library in the Tenant Admin as service list page entries and category list page entries (if they do not already exist). Service and category names must be unique. Languages must adhere to ISO-639-2 standards in accordance with the Open Referral HSDA standard.

you@your-company.com

## Servers

`http://host/Rest https://host/Rest`

## API methods: Service

### POST /v1/epa/service

Create service offering records for an externally registered provider in Watson Care Manager.

```
cURL curl -X POST "https://host:port/Rest/v1/epa/service" -H "accept: application/json" -H "Content-Type: application/json" -d " { "messageID" : "123", "id" : "extServiceESR1", "organization_id": "extProvider466000", "name": "ext service1 name", "description": "ext service1 desc", "status": "active", "fees": "21", "taxonomys": [ { "id": "extCategoryESR1", "term": "ext category1 name" }, { "id": "extCategoryESR2", "term": "ext category2 name" } ], "languages": [ { "id": "extLangESR1", "language": "en" }, { "id": "extLangESR2", "language": "kn" }, { "id": "extLangESR3", "language": "es" }, { "id": "extLangESR4", "language": "sa" } ], "source": { "coding": [ { "system": "http://wcm/source", "code": "ExtSS466000" } ], "text": "Acme Systems" }, "originalSource": { "coding": [ { "system": "http://wcm/originalsource", "code": "ExtSS466001" } ], "text": "Acme Systems" } } "
JAVA HttpResponse response = Unirest.post("https://host:port/Rest/v1/epa/service") .header("accept", "application/json") .header("Content-Type", "application/json") .body(" { "messageID" : "123", "id" : "extServiceESR1", "organization_id": "extProvider466000", "name": "ext service1 name", "description": "ext service1 desc", "status": "active", "fees": "21", "taxonomys": [ { "id": "extCategoryESR1", "term": "ext category1 name" }, { "id": "extCategoryESR2", "term": "ext category2 name" } ], "languages": [ { "id": "extLangESR1", "language": "en" }, { "id": "extLangESR2", "language": "kn" }, { "id": "extLangESR3", "language": "es" }, { "id": "extLangESR4", "language": "sa" } ], "source": { "coding": [ { "system": "http://wcm/source", "code": "ExtSS466000" } ], "text": "Acme Systems" }, "originalSource": { "coding": [ { "system": "http://wcm/originalsource", "code": "ExtSS466001" } ], "text": "Acme Systems" } } ")
response.asString();
```

## Parameters

### body(*body*)

**Request body in the JSON format.**

**Schema:** [NewServiceInfo \(on page 819\)](#)

**required** true

## Responses

**201**

The post request was successful.

#### Headers

Name	Description	Schema
Location	The location of the new resource.	<b>type</b> string

#### 400

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

The following list outlines the possible error messages: EPAERR3201 - It is mandatory to specify 'name'. EPAERR3202 - The 'name' entered is too small. The minimum characters that is allowed is 3. EPAERR3203 - The 'name' entered is too long. The maximum characters that is allowed is 100. EPAERR3204 - It is mandatory to specify 'status'. EPAERR3205 - The 'status' entered is too long. The maximum characters that is allowed is 20. EPAERR3206 - The 'description' entered is too long. The maximum characters that is allowed is 2000. EPAERR3207 - The 'source' entered is too long. The maximum characters that is allowed is 100. EPAERR3208 - The 'originalSource' entered is too long. The maximum characters that is allowed is 100. EPAERR3209 - The service ID is invalid. EPAERR3210 - The service ID exists. EPAERR3211 - The service ID is already associated with the provider ID. EPAERR3212 - The 'reason' entered is too long. The maximum characters that is allowed is 2000.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 828](#))

#### 500

An internal server error occurred. Contact your administrator for more information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 828](#))

#### default

An unexpected error occurred. Check the error message for further information.

### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

([on page 828](#))

## PUT /v1/epa/service

Update a provider's service offering record in Watson Care Manager.

```
cURL curl -X POST "https://host:port/Rest/v1/epa/service" -H "accept: application/json" -H "Content-Type: application/json" -d " { "messageID" : "123", "id" : "extServiceESR1", "organization_id": "extProvider466000", "name": "ext service1 name", "description": "ext service1 desc", "status": "active", "fees": "21", "taxonomys": [{ "id": "extCategoryESR1", "term": "ext category1 name" }, { "id": "extCategoryESR2", "term": "ext category2 name" }], "languages": [{ "id": "extLangESR1", "language": "en" }, { "id": "extLangESR2", "language": "kn" }, { "id": "extLangESR3", "language": "es" }, { "id": "extLangESR4", "language": "sa" }]} " JAVA HttpResponse response = Unirest.post("https://host:port/Rest/v1/epa/service") .header("accept", "application/json") .header("Content-Type", "application/json") .body(" { "messageID" : "123", "id" : "extServiceESR1", "organization_id": "extProvider466000", "name": "ext service1 name", "description": "ext service1 desc", "status": "active", "fees": "21", "taxonomys": [{ "id": "extCategoryESR1", "term": "ext category1 name" }, { "id": "extCategoryESR2", "term": "ext category2 name" }], "languages": [{ "id": "extLangESR1", "language": "en" }, { "id": "extLangESR2", "language": "kn" }, { "id": "extLangESR3", "language": "es" }, { "id": "extLangESR4", "language": "sa" }]} ") .asString();
```

### Parameters

**body**(*body*)

**Request body in the JSON format.**

**Schema:** [ModifiedServiceInfo](#) ([on page 821](#))

**required**true

### Responses

**200**

The put request was successful.

### Media types

**application/json****Schema** [UpdateServiceResponse](#)*(on page 824)***400**

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

The following list outlines the possible error messages: EPAERR3201 - It is mandatory to specify 'name'. EPAERR3202 - The 'name' entered is too small. The minimum characters that is allowed is 3. EPAERR3203 - The 'name' entered is too long. The maximum characters that is allowed is 100. EPAERR3204 - It is mandatory to specify 'status'. EPAERR3205 - The 'status' entered is too long. The maximum characters that is allowed is 20. EPAERR3206 - The 'description' entered is too long. The maximum characters that is allowed is 2000. EPAERR3207 - The 'source' entered is too long. The maximum characters that is allowed is 100. EPAERR3208 - The 'originalSource' entered is too long. The maximum characters that is allowed is 100. EPAERR3209 - The service ID is invalid. EPAERR3210 - The service ID exists. EPAERR3211 - The service ID is already associated with the provider ID. EPAERR3212 - The 'reason' entered is too long. The maximum characters that is allowed is 2000.

**Media types****application/json****Schema** [DefaultErrorModel](#)*(on page 828)***500**

An internal server error occurred. Contact your administrator for more information.

**Media types****application/json****Schema** [DefaultErrorModel](#)*(on page 828)***default**

An unexpected error occurred. Check the error message for further information.

**Media types**

**application/json****Schema** [DefaultErrorModel](#)*(on page 828)*

## POST /v1/epa/service/close

Close a service offering for a provider in Watson Care Manager.

```
cURL curl -X POST "https://host:port/Rest/v1/epa/service/close" -H "accept: application/json" -H
"Content-Type: application/json" -d " { "messageID" : "123", "id" : "extServiceESR1", "organization_id":
"extProvider466000", "end_date": "2021-04-09", "reason" : "reason to close" } " JAVA HttpResponse
response = Unirest.post("https://host:port/Rest/v1/epa/service/close") .header("accept", "application/
json") .header("Content-Type", "application/json") .body(" { "messageID" : "123", "id" : "extServiceESR1",
"organization_id": "extProvider466000", "end_date": "2021-04-09", "reason" : "reason to close" }
") .asString();
```

### Parameters

**serviceID**(*body*)

**JSON object containing the reference id of a service..**

**Schema:** [DeleteService](#) (*on page 825*)

**required** true

### Responses

**200**

The post operation was successful.

#### Media types

**application/json**

**Schema type** array

**items \$ref** [ActionCountResponse](#)

*(on page 828)*

**400**

The data request is invalid. Check the error message for further information and resend the request with the corrected data. A possible error message is EPAERR3212 - The 'reason' entered is too long. The maximum characters that is allowed is 2000.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 828)*

#### 500

An internal server error occurred. Contact your administrator for more information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 828)*

#### default

An unexpected error occurred. Check the error message for further information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 828)*

## POST /v1/epa/service/open

Reopen a service offering for a provider in Watson Care Manager.

```
cURL curl -X POST "https://host:port/Rest/v1/epa/service/open" -H "accept: application/json" -H  
"Content-Type: application/json" -d " { "messageID" : "123", "id" : "extServiceESR1", "organization_id":  
"extProvider466000", "reason" : "reason to open" } " JAVA HttpResponse response = Unirest.post("https:/  
/host:port/Rest/v1/epa/service/open") .header("accept", "application/json") .header("Content-  
Type", "application/json") .body(" { "messageID" : "123", "id" : "extServiceESR1", "organization_id":  
"extProvider466000", "reason" : "reason to open" } ") .asString();
```

## Parameters

**serviceID**(*body*)

**JSON object containing the reference id of a service..**

**Schema:** [OpenService \(on page 826\)](#)

**required** true

## Responses

**200**

The post operation was successful.

**Media types**

**application/json**

**Schema type** array

**items \$ref** [ActionCountResponse](#)

*(on page 828)*

**400**

The data request is invalid. Check the error message for further information and resend the request with the corrected data. A possible error message is EPAERR3212 - The 'reason' entered is too long. The maximum characters that is allowed is 2000.

**Media types**

**application/json**

**Schema** [ModelError](#)

*(on page 828)*

**500**

An internal server error occurred. Contact your administrator for more information.

**Media types**

**application/json**

**Schema** [ModelError](#)

*(on page 828)*

**default**

An unexpected error occurred. Check the error message for further information.

**Media types****application/json****Schema** [DefaultErrorModel](#)*(on page 828)*

## Components

### Schemas

#### NewServiceInfo

**Properties****messageID** integer(*int64*)**example** 1552641913250**description**

The internal record ID for a service. The field is optional.

**id** string**example** extServiceESR1**description**

The unique identifier of a service. The field is mandatory.

**minLength** 0**maxLength** 20**organization\_id** string**example** extService466000**description**

The reference identifier for an organization. The field is mandatory.

**minLength** 0**maxLength** 20

<b>name</b>	<b>\$ref</b> <a href="#">NewServiceName</a> <i>(on page 824)</i>
<b>description</b>	string
	<b>example</b> ext service description
	<b>description</b> The description of the service. The field is optional.
	<b>minLength</b> 0
	<b>maxLength</b> 2000
<b>status</b>	string
	<b>example</b> Status of the service
	<b>description</b> The status of the provider. This field is mandatory
	<b>minLength</b> 0
	<b>maxLength</b> 20
<b>fees</b>	string( <i>money</i> )
	<b>description</b> The fee for the service. This field is optional.
<b>taxonomies</b>	array
	<b>items</b> <b>\$ref</b> <a href="#">NewTaxonomyList</a> <i>(on page 822)</i>
<b>languages</b>	array
	<b>items</b> <b>\$ref</b> <a href="#">LanguagesList</a> <i>(on page 823)</i>
<b>originalSource</b>	object
	<b>description</b> Contains the original source system details. The system and code that corresponds to the original source system of the note. The external reference of the original source system is http://wcm/originalsourcecode. The field is optional.
<b>\$ref</b>	<a href="#">ExternalServiceSource</a> ( <i>on page 824</i> )

**source** object

**description**

Contains the source details. The system and code that corresponds to the source of the note. The external reference of the original system is http://wcm/sourcecode. The field is mandatory.

**\$ref** [ExternalServiceSource \(on page 824\)](#)

**type** object

## ModifiedServiceInfo

### Properties

**messageID** integer(*int64*)

**example** 1552641913250

**description**

The internal record ID for a service. The field is optional.

**id** string

**example** extServiceESR1

**description**

The unique identifier of a service. The field is mandatory.

**minLength** 0

**maxLength** 20

**organization\_id** string

**example** extService466000

**description**

The reference identifier for an organization. The field is mandatory.

**minLength** 0

**maxLength** 20

**name** [\\$ref ModifiedServiceName \(on page 824\)](#)

**description** string

**example** ext service description

**description**  
The description of the service. The field is optional.

**minLength** 0

**maxLength** 2000

**status** string

**example** Status of the service

**description**  
The status of the provider. The field is mandatory.

**minLength** 0

**maxLength** 20

**fees** string(*money*)

**description**  
The fee for the service. The field is optional.

**taxonomies** array

**items \$ref** UpdatedTaxonomyList  
(*on page 823*)

**languages** array

**items \$ref** LanguagesList  
(*on page 823*)

**type** object

## NewTaxonomyList

### Properties

**id** string

**example** extCategoryESR1

**description**  
The unique identifier of a category.

**maxLength** 20

**term** string

**example** ext category name

**description**

The name of a service category.

**type** object

## UpdatedTaxonomyList

### Properties

**id** string

**example** extCategoryESR1

**description**

The unique identifier of a category.

**maxLength** 20

**term** string

**example** ext category name updated

**description**

The name of a service category.

**type** object

## LanguagesList

### Properties

**id** string

**example** extLangESR1

**description**

The unique identifier of a category.

**maxLength** 20

**term** string

**example** en

**description**

The code of the language. The code is case sensitive. It is mandatory that the code is in lower case.

**type** object

## NewServiceName

**type** string

**example** ext service name

**description**  
The name of the service. The field is mandatory.

**minLength** 3

**maxLength** 100

## ModifiedServiceName

**type** string

**example** ext service name updated

**description**  
The name of the service. The field is mandatory.

**minLength** 3

**maxLength** 100

## ExternalServiceSource

### Properties

**text** string

**example** Acme Systems

**description**  
The source details.

**maxLength** 100

**coding** \$ref [SourceCoding](#)

*(on page  
827)*

**type** object

## UpdateServiceResponse

### Properties

**message** string

**example** OK

**description**  
The response message from the API.

**entries** array

**description**  
The list of services.

**uniqueItems** true

**items** \$ref [ModifiedServiceInfo](#)  
(*on page 821*)

**type** object

## DeleteService

### Properties

**messageID** integer(*int64*)

**example** 1552641913250

**description**  
The internal record ID for a service. The field is optional.

**id** string

**example** extServiceESR1

**description**  
The unique identifier of a service. The field is mandatory.

**minLength** 0

**maxLength** 20

**organization\_id** string

**example** extService466000

**description**  
The reference identifier for an organization. The field is mandatory.

**minLength** 0

**maxLength** 20

**end\_date** string(*date*)

**example** 2021-04-09

**description**

The end date of the service. The field is optional.

**reason** string

**example** No longer needed.

**description**

The reason to delete the service details. The field is optional.

**minLength** 0

**maxLength** 2000

**type** object

## OpenService

### Properties

**messageID** integer(*int64*)

**example** 1552641913250

**description**

The internal record ID for a service. The field is optional.

**id** string

**example** extServiceESR1

**description**

The unique identifier of a service. This field is mandatory.

**minLength** 0

**maxLength** 20

**organization\_id** string

**example** extService466000

**description**

The reference identifier for the organization. The field is mandatory.

**minLength** 0

**maxLength** 20

**reason** string

**example** Closed by mistake.

**description**

The reason to open the service details. The field is optional.

**minLength** 0

**maxLength** 2000

**type** object

## SourceCoding

### Properties

**system** string

**example** http://wcm/originalsource

**description**

The FHIR system details.

**maxLength** 100

**code** string

**example** ExtSS466001

**description**

The FHIR code reference details.

**maxLength** 100

**type** object

## GenericResponse

### Properties

**message** string

**example** OK

**description**

The response message from the API.

**type** object

## ActionCountResponse

### Properties

**successCount** integer(*int32*)

**example** 8

**description**  
The success count.

**failureCount** integer(*int32*)

**example** 2

**description**  
The failure count.

**totalCount** integer(*int32*)

**example** 10

**description**  
The total number  
of entries.

**type** object

## DefaultModelError

### Properties

**Error** array

**items** \$ref [Error \(on](#)

[page](#)

[828\)](#)

**type** object

## Error

### Properties

**code** integer(*int32*)

**description**

A machine-readable code that identifies the problem. This code does not vary with the Accept-Language setting.

**message** string**description**

A human-readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text can change over time.

**level** string**description**

The level of the error.

**type** object**required**

- code
- message
- level

## Federated Users API

Version:v1

By using the protected API that follows, you can create federated user accounts in Watson Care Manager that are stored in an external identity provider. When received, Watson Care Manager security administrators can manage the user account in the same way that manually created accounts are in the Watson Care Manager security workspace.

### Servers

<https://host/Rest>

API methods: Create a federated user

**POST /v1/federatedidentity/usermanagement/user**

Create a federated user in Watson Care Manager.

Creates a federated user account record based on an event in the external system that initiates a transfer of valid data to Watson Care Manager.

### Example request

CURL

```
curl POST -X "http://host:port/Rest/v1/federatedidentity/usermanagement/user" -H
"Content-Type: application/json" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance"
-H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Referer: curam://foundational.app"
-d "{\"firstName\": \"Jane\", \"lastName\": \"Doe\", \"email\": \"jane@example.com\", \"workspaces\": \"Security
Administrator,Care Team\", \"securityRoles\": \"Care Team Standard Access\"}"
```

JAVA

```
HttpResponse response = Unirest.get("https://host:port/Rest/v1/federatedidentity/usermanagement/user")
.header("accept", "application/json")
.header("Authorization", "access_token")
.header("X-GRANT-TYPE", "client_credentials")
.header("Referer", "curam://foundational.app")
.body("{\"firstName\": \"Jane\", \"lastName\": \"Doe\", \"email\": \"jane@example.com\", \"workspaces\": \"Security
Administrator,Care Team\", \"securityRoles\": \"Care Team Standard Access\"}").asString();
```

## Parameters

### Referer(header)

**type** string

**array** curam://foundational.app

**required** true

### X-WCM-TENANT-ID(header)

**type** string

**array** The tenant ID.

**required** true

### X-WCM-TENANT-INSTANCE(header)

**type** string

**array** The tenant instance.

**required** true

**Authorization**(*header*)

**type** string

**array** The Access Token.

**required** true

**X-GRANT-TYPE**(*header*)

**type** string

**array** client\_credentials

**required** true

## Request body

**Required:**true

**Media types**

application/json

**Schema** [NewCreateUserDetails](#)

(on page 833)

## Responses

**200**

The post request was successful.

**Media types**

application/json

**Schema** [NewCreateUserDetailsResponse.JsonResponse](#)

(on page 835)

**400**

The data request is invalid. Check the error message for further information and resend the request with the corrected data. Possible error messages:

1. The email address entered has already been assigned to another user. Please enter a different email address.
2. Invalid user email.
3. Invalid user email. 'Email Address' must be entered.
4. 'Default Workspace' must be entered.
5. User name cannot be empty. Please enter first name and surname.

#### **Media types**

**application/json**

**Schema** [ModelError](#)

*(on page 835)*

#### **500**

The data request is invalid. Check the error message for further information and resend the request with the corrected data. Possible error messages:

1. An un-handled server exception occurred. Please contact your administrator. Note:  
This error is caused by inputting an unsupported value for the workspaces or not authenticating correctly.

#### **Media types**

**application/json**

**Schema** [ModelError](#)

*(on page 835)*

#### **default**

An unexpected error occurred. Check the error message for further information.

#### **Media types**

**application/json**

**Schema** [DefaultErrorModel](#)  
*(on page 835)*

## Components

### Schemas

#### NewCreateUserDetails

##### Properties

**email** string

**description**  
The user's login ID.

**maxLength** 256

**firstName** string

**description**  
The name of the  
person.

**maxLength** 65

**lastName** string

**description**  
The surname of  
the person.

**maxLength** 65

**workspaces** string

**description**  
A comma-  
separated list of  
workspaces for  
the user account.  
The order of the  
list is important.  
The first entry is  
the user's default  
workspace. The

workspace names  
must match the  
values configured  
in Watson Care  
Manager.

**maxLength** 500

**securityRoles** string

**description**

An optional  
parameter to  
specify a comma-  
separated list of  
security roles for  
user accounts  
assigned to  
the Care Team  
workspace.  
Watson Care  
Manager includes  
1 default security  
role called Care  
Team Standard  
Access on all  
deployments with  
role based access  
control enabled.  
If additional  
security roles  
are configured  
by a security  
administrator, you  
can specify them  
here. Alternatively,  
if you want to  
create a user only  
with the Care  
Team workspace

assigned and  
but no security  
role, leave this  
field blank. The  
security role  
names must  
match the values  
configured in  
Watson Care  
Manager.

**maxLength** 500

**type** object

**required**

- email
- firstName
- lastName
- workspaces

## NewCreateUserDetailsResponseJsonResponse

**Properties**

**username** string

**description**

The unique ID of the user account created in the system. Watson Care Manager uses this ID internally to identify the user accounts and it is not displayed in the user interface.

**maxLength** 64

**type** object

## DefaultModelError

**Properties**

**Error** array

**items** \$ref [Error \(on page 836\)](#)

**type** object

## Error

### Properties

**code** integer(*int32*)

#### description

A machine readable code identifying the problem. This will not vary with the Accept-Language setting.

**message** string

#### description

A human readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text may change over time.

**level** string

#### description

The level of the error.

**type** object

### required

- code
- message
- level

## Notes API

Version:v1

By using the protected APIs that follow, you can create notes, delete notes, and retrieve the latest notes information for clients who are registered in Watson Care Manager.

### Servers

<https://host/Rest>

## API methods: Get notes

### GET /v1/ees/notes

Get a client's notes based on their identification type and number.

Retrieve a client's notes based on their identification type and number, for example, their passport and passport number. You can further refine the search by providing the client's date of birth. **Example request**

CURL

```
curl -X GET

"https://host:port/Rest/v1/ees/notes?PatientIdentifierValue=&PatientIdentifier=&since=&page=&limit=&birthDate="

-H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Authorization: access_token" -H

"X-GRANT-TYPE: client_credentials" -H "accept: application/json" -H "Referrer: curam://foundational.app"
```

JAVA

```
HttpResponse response =
Unirest.get("https://
host:port/Rest/v1/ees/notes?PatientIdentifierValue=&PatientIdentifier=&since=&page=&limit=&birthDate=' '")
.header("accept", "application/json")
.header("Authorization", "access_token")
.header("X-GRANT-TYPE", "client_credentials")
.header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
.header("X-WCM-TENANT-ID", "Tenant ID")
.header("Referrer", "curam://foundational.app")
.asString();
```

## Parameters

### Referer(header)

**type** string

**array** curam://foundational.app

**required** true

### X-WCM-TENANT-ID(header)

**type** string

**array** The tenant ID.

**required** true

**X-WCM-TENANT-INSTANCE(header)**

**type** string

**array** The tenant instance.

**required** true

**Authorization(header)**

**type** string

**array** The Access Token.

**required** true

**X-GRANT-TYPE(header)**

**type** string

**array** client\_credentials

**required** true

**PatientIdentifierValue(query)**

The identification number that is provided for the PatientIdentifier.

**type** string

**maxLength** 200

**required** true

**PatientIdentifier(query)**

The type of identification that is provided for the individual.

**type** string

**maxLength** 200

**required** false

**since(query)**

The date and time from which you want to return records for an individual with associated added or updated notes. Specify the date and time in ISO 8601 combined format YYYYMMDDTHHMMSS. For example, 20170824T141417. The default returns the entire results set.

**type** string

**maxLength** 20

**required** false

**page(query)**

The parameter to allow the pagination persist through the API results set.

**type** number

**maxLength** 1000000

**required** false

**limit(query)**

The number of records to return in each page of results. The default page limit is 1000.

**type** number

**maxLength** 4

**required** false

**birthDate(query)**

The date of birth of the individual. Specify date in in ISO 8601 format YYYYMMDD. For example, 20010824.

**type** string

**maxLength** 20

**required** false

## Responses

**200**

The get request was successful.

**Media types**

**application/json**

**Schema** [INResponseDetails](#)

*(on page 848)*

**400**

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 861)*

**401**

Invalid authentication credentials for the target resource entered.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 861)*

**500**

An internal server error occurred. Contact your administrator for more information.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 861)*

**default**

An unexpected error occurred. Check the error message for further information.

**Media types**

**application/json****Schema DefaultErrorModel***(on page 861)*

## API methods: Create notes

### POST /v1/ees/notes

Create notes for a client who is registered in Watson Care Manager.

#### Example request

cURL

```
curl POST -X "http://host:port/Rest/v1/ees/notes" -H
"Content-Type: application/json" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H
"Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "Referer: curam//foundational.app"
```

JAVA

```
HttpResponse response = Unirest.get("https://host:port/Rest/v1/ees/notes")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("Referrer", "curam://foundational.app")

    .body("{\"resourceType\":\"string\", \"id\":\"string\", \"noteSubject\":\"string\", \"note\":\"string\", \"duration\":
\"string\", \"context\":\"string\", \"creationDate\":\"string\", \"addedBy\":\"string\", \"contactWith\":\"string\",
\"method\":\"string\", \"direction\":\"string\", \"outcome\":\"string\", \"validated\":true, \"latestUpdateDate\":
\"string\", \"updatedBy\":\"string\", \"comments\": [{\"datetime\":\"string\", \"comment\":\"string\", \"addedBy\":
\"string\"}], \"identifier\": [{\"value\":\"string\", \"type\": [{\"text\":\"string\"}]}], \"source\": {\"text\":\"string\",
\"coding\": [{\"system\":\"string\", \"code\":\"string\"}]}, \"originalSource\": {\"text\":\"string\", \"coding\":
[{\"system\":\"string\", \"code\":\"string\"}]}, \"programs\": [{\"program\":\"string\"}], \"subject\": {\"reference\":
\"string\"}, \"type\": {\"coding\": [{\"system\":\"string\", \"code\":\"string\"}]}}).asString();
```

## Parameters

**Referer**(*header*)

**type** string

**array** curam://foundational.app

**required**true

**X-WCM-TENANT-ID**(*header*)

**type** string

**array** The tenant ID.

**required**true

**X-WCM-TENANT-INSTANCE**(*header*)

**type** string

**array** The tenant instance.

**required**true

**Authorization**(*header*)

**type** string

**array** The Access Token.

**required**true

**X-GRANT-TYPE**(*header*)

**type** string

**array** client\_credentials

**required**true

## Request body

**Required:**true

**Media types**

application/json

**Schema** [INRequestNotesPayload](#)  
*(on page 853)*

## Responses

### 201

The post request was successful.

### 400

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)  
*(on page 861)*

### 401

Invalid authentication credentials for the target resource entered.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)  
*(on page 861)*

### 500

An internal server error occurred. Contact your administrator for more information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)  
*(on page 861)*

### default

An unexpected error occurred. Check the error message for further information.

#### Media types

**application/json****Schema** DefaultErrorModel*(on page 861)*

## API methods: Delete notes

### **DELETE /v1/ees/notes/{noteID}**

Delete notes for a client who is registered in Watson Care Manager based on the note identification number.

#### Example request

cURL

```
curl -X DELETE "http://host:port/Rest/v1/ees/notes/{noteID}" -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "accept: application/json" -H "Referer: curam://foundational.app" -H "Content-Type: application/json"
```

JAVA

```
HttpResponse response = Unirest.get("https://host:port/Rest/v1/ees/notes/{notesID}")

.header("accept", "application/json")
.header("Authorization", "access_token")
.header("X-GRANT-TYPE", "client_credentials")
.header("Referrer", "curam://foundational.app")

.body("{\"noteID\":\"string\", \"deleteReason\":\"string\", \"comment\":\"string\", \"originalSource\":{\"text\":
\"string\", \"coding\":[{\"system\":\"string\", \"code\":\"string\"}]}, \"source\":{\"text\":\"string\", \"coding\":[
{\"system\":\"string\", \"code\":\"string\"}]}}")
.asString();
```

## Parameters

**Referer(header)****type** string**array** curam://foundational.app

**required** true

**X-WCM-TENANT-ID**(*header*)

**type** string

**array** The tenant ID.

**required** true

**X-WCM-TENANT-INSTANCE**(*header*)

**type** string

**array** The tenant instance.

**required** true

**Authorization**(*header*)

**type** string

**array** The Access Token.

**required** true

**X-GRANT-TYPE**(*header*)

**type** string

**array** client\_credentials

**required** true

**noteID**(*path*)

The unique note identifier.

**type** string

**required** true

## Request body

**Required:**false

**Media types**

application/json

**Schema** [INRequestCancelNotesPayload](#)  
*(on page 857)*

## Responses

### 204

The delete request was successful.

### 400

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)  
*(on page 861)*

### 401

Invalid authentication credentials for the target resource entered.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)  
*(on page 861)*

### 500

An internal server error occurred. Contact your administrator for more information.

#### Media types

**application/json**

**Schema** [DefaultErrorModel](#)  
*(on page 861)*

### default

An unexpected error occurred. Check the error message for further information.

#### Media types

**application/json**

**Schema** [DefaultModelError](#)

(*on page 861*)

## Components

### Schemas

#### Paging

##### Properties

**previous** string

**description**  
Previous.

**maxLength** 150

**next** string

**description**  
Next.

**maxLength** 150

**type** object

### TenantDetails

##### Properties

**tenantID** string

**description**  
The tenant identifier.

**maxLength** 500

**instanceType** string

**description**  
The tenant instance  
type.

**maxLength** 500

**type** object

## INResponseDetails

### Properties

**notes** array

**items** \$ref [INResponseDetailsNote](#)  
*(on page 848)*

**paging** \$ref [Paging](#)  
*(on page  
847)*

**tenantDetails** \$ref [TenantDetails](#)  
*(on page  
847)*

**type** object

## INResponseDetailsNote

### Properties

**noteID** string

**description**  
The note unique identifier.

**subject** string

**description**  
The subject text for the  
note.

**maxLength** 120

**note** string

**description**  
The text for the note.

**maxLength** 30720

**status** string

	<b>description</b> The status of the note. The status is always Final as the note is not editable by users of Watson Care Manager. If the note is deleted by the external system, the status is Canceled.
	<b>maxLength</b> 500
<b>duration</b>	string
	<b>description</b> Indicates how long the client activity is expected to take, in minutes.
	<b>maxLength</b> 4
<b>context</b>	string
	<b>description</b> The note context details.
	<b>maxLength</b> 500
<b>creationDate</b>	string
	<b>description</b> The creation date of the note.
	<b>maxLength</b> 20
<b>addedBy</b>	string
	<b>description</b> The username associated with the organization's API account or the name of the user who added the note in the external system. If a username is received, Watson Care Manager checks that the

username is associated with a valid Watson Care Manager account and displays the user's full name in Watson Care Manager. Otherwise, the value entered is displayed.

**maxLength** 131

**contactWith** string

**description**

One or more people who were interacted with when the touchpoint was recorded.

**maxLength** 500

**method** string

**description**

The communication method recorded when the touchpoint was created.

**maxLength** 500

**direction** string

**description**

The direction of the communication when the touchpoint was created, Outbound or Inbound.

**maxLength** 500

**outcome** string

**description**

The outcome of the contact, Successful or Unsuccessful.

**maxLength** 500

<b>validated</b>	boolean
	<b>description</b> Indicates whether the identity of the person who was contacted was validated.
<b>latestUpdateDate</b>	string
	<b>description</b> <b>maxLength</b> 20
<b>updatedBy</b>	string
	<b>description</b> <b>maxLength</b> 131
<b>sensitiveInd</b>	boolean
	<b>description</b> Indicates whether the note is sensitive.
<b>shareWith</b>	string
	<b>description</b> The name of the external system the note can be shared with.
	<b>maxLength</b> 256
<b>share</b>	boolean
	<b>description</b> Indicates whether the note can be shared.
<b>deleteReason</b>	string
	<b>description</b> The reason for the note deletion.
	<b>maxLength</b> 256
<b>comments</b>	array

**items \$ref** [INResponseDetailsComment](#)

*(on page 852)*

**originalSource** array

**items \$ref** [OriginalSource](#)

*(on page  
858)*

**programs** array

**items \$ref** [INResponseDetailsPrograms](#)

*(on page 853)*

**source** array

**items \$ref** [Source](#)

*(on page  
858)*

**type** array

**items \$ref** [Type \(on](#)

*page  
859)*

**type** object

## INResponseDetailsComment

### Properties

**datetime** string

**description**

The timestamp of the comment.

**maxLength** 20

**comment** string

**description**

Comments that are added to the note or No Records if the note has no associated comments.

**maxLength** 300**addedBy** string**description**

The username associated with the organization's API account or the name of the user who added the comment in the external system. If a username is received, Watson Care Manager checks that the username is associated with a valid Watson Care Manager account and displays the user's full name in Watson Care Manager. Otherwise, the value entered is displayed.

**maxLength** 131**description**

The number of comments that are added to a note.

**type** object**INResponseDetailsPrograms****Properties****program** string**description**

One or more programs associated with the touchpoint.

**maxLength** 500**type** object**INRequestNotesPayload****Properties****resourceType** string

	<b>description</b>	Mandatory. The resource type. This attribute accepts one of the following values:
		note
<b>id</b>	string	
	<b>description</b>	Mandatory. The unique identifier for the note.
<b>noteSubject</b>	string	
	<b>description</b>	Mandatory. The subject text for the note.
	<b>maxLength</b>	120
<b>note</b>	string	
	<b>description</b>	Mandatory. The note text.
	<b>maxLength</b>	30720
<b>duration</b>	string	
	<b>description</b>	Optional. Indicates how long the client activity is expected to take, in minutes. This attribute accepts a numeric value up to a maximum of 4 digits.
	<b>maxLength</b>	4
<b>context</b>	string	
	<b>description</b>	Mandatory. The note context details. This attribute accepts one of the following values: Assessment General Review Alert Barrier External
	<b>maxLength</b>	500
<b>creationDate</b>	string	
	<b>description</b>	Mandatory. The creation date of the note. The expected format is ISO 8601 standard date-time format.
	<b>maxLength</b>	20

**addedBy**

string

**description**

Mandatory. The username associated with the organization's API account or the name of the user who added the note in the external system. If a username is received, Watson Care Manager checks that the username is associated with a valid Watson Care Manager account and displays the user's full name in Watson Care Manager. Otherwise, the value entered is displayed.

**maxLength** 131**contactWith**

string

**description**

Mandatory. Applies only touchpoints. The people who were interacted with when the note was recorded. This attribute accepts one or more of the following values (Use a comma-separated list if providing more than one value). Client Care Giver Care Team Family Member Medical Other

**maxLength** 500**method**

string

**description**

Mandatory. The communication method recorded when the touchpoint was created. This attribute accepts one of the following values: Phone Email Face to Face Home Face to Face Other Mail Other Text

**maxLength** 500**direction**

string

**description**

Mandatory. The direction of the communication when the touchpoint was created, Outbound or Inbound. This attribute accepts one of the following values: Outbound Inbound

**maxLength** 500**outcome**

string

	<b>description</b>	Mandatory. Applies only to touchpoints. The outcome of the touchpoint. This attribute accepts one of the following values: Successful Unsuccessful
	<b>maxLength</b>	500
<b>validated</b>	boolean	
	<b>description</b>	Optional. Applies only to touchpoints. Indicates whether the identity of the person who was contacted was validated. This attribute accepts one of the following values: TRUE FALSE
<b>sensitiveInd</b>	boolean	
	<b>description</b>	Optional. Indicates whether the note is sensitive. If not specified, the note is created in Watson Care Manager as non-sensitive.
	<b>default</b>	false
<b>serviceDeliveryID</b>	string	
	<b>description</b>	Optional. Receives a note that is associated with a service. This attribute associates the note with the correct service.
	<b>maxLength</b>	500
<b>comments</b>	array	
	<b>items \$ref</b>	<a href="#">INResponseDetailsComment</a> (on page 852)
<b>identifier</b>	array	
	<b>items \$ref</b>	<a href="#">Identifier</a> (on page 861)
<b>source</b>	<b>description</b>	Mandatory.
	<b>\$ref</b>	Source (on page 858)

**originalSource**    **description**    Optional.  
**\$ref**              [OriginalSource](#)  
*(on page 858)*

**programs**        array

**items** **\$ref** [INResponseDetailsPrograms](#)  
*(on page 853)*

**subject**          **\$ref** [SubjectIdentifier](#)  
*(on page 860)*

**type**              **\$ref** [INRequestNotesType](#)  
*(on page 859)*

**type** object

## INRequestCancelNotesPayload

### Properties

**noteID**            string

**description**      Mandatory. The unique note identifier assigned by the external system.

**deleteReason**     string

**description**      Optional. The note deletion reason.

**maxLength** 256

**comment**           string

**description**      Optional. The comment added when the note was deleted.

**maxLength** 300

**originalSource** **\$ref** [OriginalSource](#)  
*(on page 858)*

**source**      \$ref [Source](#)  
*(on page  
858)*

**type** object

## OriginalSource

### Properties

**text**    string

**description**    Description of the original source system.

**maxLength** 300

**coding** array

**items** \$ref [CodingPR](#)  
*(on page  
860)*

**description**

The name of the original source system where the note first originated. The external system identifies the original source system by its external system reference.

**type**    object

## Source

### Properties

**text**    string

**description**    Description of the source.

**maxLength** 300

**coding** array

**items** \$ref [CodingPR](#)  
*(on page  
860)*

**description**

The source of the note. The external system identifies the source by its external system reference.

**type** object

**INRequestNotesType****Properties**

**coding** array

**items \$ref CodingPR**  
*(on page  
860)*

**type** object

**Type****Properties**

**text** string

**description** Description of the note type details.

**maxLength** 300

**coding** array

**items \$ref Coding**  
*(on page  
859)*

**type** object

**Coding****Properties**

**system** string

**maxLength** 900

**version** string

**maxLength** 900

**code** string

**description**  
Mandatory.

**maxLength** 900

**display** string

**maxLength** 900

**userSelected** boolean

**type** object

## CodingPR

### Properties

**system** string

**maxLength** 900

**code** string

**maxLength** 900

**type** object

## SubjectIdentifier

### Properties

**reference** string

**description**  
The string value for this attribute must be provided in the following format: "Patient/{IndividualID}".  
  
The {IndividualID} must either be the Reference Number recorded for the client in Watson Care Manager or two identifier properties (Key=value).  
The allowed properties are: identifier={Existing identifier in Watson Care Manager} identifierValue={Value for the existing identifier for the client}  
  
The identifier must map to a configured identification in Watson Care Manager created by an Administrator. Example custom identifier

for the Reference attribute: "Patient/identifier=Passport Number, identifierValue=LI23451".

**maxLength** 150

**type** object

## DefaultModelError

### Properties

**Error** array

**items \$ref** Error (*on*

*page*

*862*)

**type** object

## Identifier

### Properties

**value** string

#### **description**

The Identifier object holds the values of an external identifier for the enclosing record.

**maxLength** 300

**type** array

**items \$ref** CodetableConcept

(*on page 861*)

**type** object

## CodetableConcept

### Properties

**text** string

**maxLength** 900

**type** object

## Error

### Properties

**code** integer(*int32*)

**description**

A machine readable code identifying the problem. This will not vary with the Accept-Language setting.

**message** string

**description**

A human readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text may change over time.

**level** string

**description**

The level of the error.

**type** object

**required**

- code
- message
- level

## Program

Version:v1

By using the protected API that follows, you can retrieve a client's program details so that extended care team members (who are not Watson Care Manager users) can view the information in external systems. The API sends program assignment details and updates like program status changes. The Get Program Details call returns the program details along with a URL to get the information. Watson Care Manager uses webhooks to notify subscribers so that they can call back for the updated program details.

## Servers

<http://host/Rest>

## API methods: Get program

### GET /v1/ees/programstatus/{id}

Get client program details.

When a care team member assigns a program to a client, updates a program status, or updates program details in Watson Care Manager, a notification is sent to the external systems that are subscribed to the program data type in Watson Care Manager. The external system receives a notification with a URL that contains the ID of the program record. For example, if the ID of the program record is 123, the URL contained in the notification is /Rest/v1/ees/programstatus/123. The external system must call this URL to retrieve the program details.

#### Example request

CURL

```
curl -X GET https://host:port/Rest/v1/ees/programstatus/123 -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H "accept: application/json"
```

JAVA

```
HttpResponse response = Unirest.get("https://host:port/Rest/v1/ees/programstatus/123")
    .header("accept", "application/json")
    .header("Authorization", "access_token")
    .header("X-GRANT-TYPE", "client_credentials")
    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
    .header("X-WCM-TENANT-ID", "Tenant ID")
    .asString();
```

## Parameters

### Referer(header)

**type** string

**array** curam://foundational.app

**required** true

**X-WCM-TENANT-ID**(*header*)

**type** string

**array** The tenant ID.

**required** true

**X-WCM-TENANT-INSTANCE**(*header*)

**type** string

**array** The tenant instance.

**required** true

**Authorization**(*header*)

**type** string

**array** The Access Token.

**required** true

**X-GRANT-TYPE**(*header*)

**type** string

**array** client\_credentials

**required** true

**id**(*path*)

The resource id, which uniquely identifies the program record.

**type** string

**required** true

## Responses

### 200

The get request was successful.

#### Media types

application/json

**Schema** [ProgramDetailsResponse](#)  
*(on page 866)*

## 400

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

**Media types**

**application/json**

**Schema** [DefaultModelError](#)  
*(on page 868)*

## 401

Invalid authentication credentials for the target resource entered.

**Media types**

**application/json**

**Schema** [DefaultModelError](#)  
*(on page 868)*

## 404

The resource requested was not found. Check the error message for further information and resend the request with a valid resource id. Possible error message: EESERR1030 - Program not found

**Media types**

**application/json**

**Schema** [DefaultModelError](#)  
*(on page 868)*

## 500

An internal server error occurred. Contact your administrator for more information

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 868)*

**default**

An unexpected error occurred. Check the error message for further information

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 868)*

## Components

### Schemas

#### ProgramDetailsResponse

**Properties**

**id** string

**description**

The program resource id. This id uniquely identifies program record for which the details are requested.

**program** object

**\$ref** [CodeableConceptPR](#)

*(on page 868)*

**description** string

**description**

Description of the program.

**maxLength** 5000

**created** string(*datetime*)

**description**

The date of the program update or program status update.

**maximum** 99991231

**graduationDate** string

	<b>description</b> The date of the client's graduation from the program.
<b>note</b>	<b>maxLength</b> 30  string
	<b>description</b> Comments added by a user when updating the program status or editing the program details.
	<b>maxLength</b> 300
<b>status</b>	string
	<b>description</b> The status of the program, Assigned, Pending, Enrolled, Not Enrolled, Disenrolled, Completed.
	<b>maxLength</b> 200
<b>programStatusReason</b>	object
	\$ref <a href="#">CodeableConceptPR</a> <i>(on page 868)</i>
<b>otherReason</b>	string
	<b>description</b> The reason entered by a user for changing the program status.
	<b>maxLength</b> 100
<b>source</b>	object
	\$ref <a href="#">CodeableConceptPR</a> <i>(on page 868)</i>
<b>originalSource</b>	object
	\$ref <a href="#">CodeableConceptPR</a> <i>(on page 868)</i>
<b>subject</b>	object
	<b>description</b> A Subject object holds the reference to the Patient the record belongs to.
	\$ref <a href="#">Subject</a> <i>(on page 868)</i>

**type** object

## Subject

### Properties

**reference** string

**maxLength** 150

**type** object

## CodeableConceptPR

### Properties

**text** string

**maxLength** 900

**coding** array

**items \$ref** CodingPR

*(on page  
868)*

**type** object

## CodingPR

### Properties

**system** string

**maxLength** 900

**code** string

**maxLength** 900

**type** object

## DefaultErrorModel

### Properties

**Error** array

**items** \$ref [Error \(on page 869\)](#)

**type** object

## Error

### Properties

**code** integer(*int32*)

**description**

A machine readable code identifying the problem. This will not vary with the Accept-Language setting.

**message** string

**description**

A human readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text may change over time.

**level** string

**description**

The level of the error.

**type** object

**required**

- code
- message
- level

## Referrals API

Version:v1

By using the protected APIs that follow, you can send unassigned referrals (with program suggestions) from an external system to Watson Care Manager, for individuals who are registered in Watson Care Manager. When received in Watson Care Manager, the supervisor or a care team member can process the referrals and use the suggested program as a reference to assign or enroll the client on a program. In

addition, you can retrieve a client referral so that extended care team members (who are not Watson Care Manager users) can view and manage the referral in an external system.

## Servers

**`https://host/Rest`**

### API methods: Create referral

#### POST /v1/ees/referralrequests

Create a referral for a client who is registered in Watson Care Manager.

Create client referral based on an event in the external system that initiates a transfer of valid data to Watson Care Manager. A referral reason value must be provided using the text, referralReasonEsr, or otherReferralReason fields.

cURL

```
curl -X POST "https://host:port/Rest/v1/ees/referralrequest" -H "X-WCM-TENANT-ID: Tenant ID" -H
"X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials"
-H "accept: application/json" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H
"X-GRANT-TYPE: client_credentials" -H "Content-Type: application/json" -d " { "resourceType": "ReferralRequest",
"source": { "coding": [ { "system": "http://wcm/source", "code": "T123" } ], "text": "Source" }, "originalSource":
{ "coding": [ { "system": "http://wcm/originalsource", "code": "wcm123" } ], "text": "OriginalSource" },
"date": "2018-01-01", "identifier": [ { "value": "1234", "type": { "text": "PHQ9" } } ], "referredToOrgUnit":
"extid123", "referredFromOrgUnit": "extid123", "reason": { "text": "Hypertension", "referralReasonEsr":
"Hypertension", "otherReferralReason": "Hypertension" }, "description": "", "subject": { "reference":
"PatientIdentifier=Passport&PatientIdentifierValue=P101" }, "priority": "medium", "date": "2018-02-02",
"serviceRequested": { "text": "Fitness Management Program" } } } "
```

)

JAVA

```
HttpResponse response = Unirest.post("https://host:port/Rest/v1/ees/referralrequest")
.header("accept", "application/json")
.header("Authorization", "access_token")
.header("X-GRANT-TYPE", "client_credentials")
.header("X-WCM-TENANT-INSTANCE", "Tenant Instance")
```

```

.header("X-WCM-TENANT-ID", "Tenant ID")

.header("Referer", "curam://foundational.app")

.header("Content-Type", "application/json")

.body(" { \"resourceType\": \"ReferralRequest\", \"source\": { \"coding\": [{ \"system\": \"http://wcm/source\", \"code\": \"T123\" }], \"text\": \"Source\" }, \"originalSource\": { \"coding\": [{ \"system\": \"http://wcm/originalsource\", \"code\": \"wcm123\" }], \"text\": \"OriginalSource\" }, \"date\": \"2018-01-01\", \"identifier\": [{ \"value\": \"1234\", \"type\": { \"text\": \"PHQ9\" } }], \"referredToOrgUnit\": \"extid123\", \"referredFromOrgUnit\": \"extid123\", \"reason\": { \"text\": \"Hypertension\", \"referralReasonEsr\": \"Hypertension\", \"otherReferralReason\": \"Hypertension\" }, \"description\": \"\", \"subject\": { \"reference\": \"PatientIdentifier=Passport&PatientIdentifierValue=P101\" }, \"priority\": \"medium\", \"date\": \"2018-02-02\", \"serviceRequested\": { \"text\": \"Fitness Management Program\" } } } ")

.asString();

```

## Parameters

### **Referer(header)**

**type** string  
**array** curam://foundational.app  
**required** true

### **X-WCM-TENANT-ID(header)**

**type** string  
**array** The tenant ID.  
**required** true

### **X-WCM-TENANT-INSTANCE(header)**

**type** string  
**array** The tenant instance.  
**required** true

### **Authorization(header)**

**type** string  
**array** The Access Token.  
**required** true

**X-GRANT-TYPE(header)**

**type** string  
**array** client\_credentials  
**required** true

**Request body**

The referral details.

**Required:**true

**Media types**

**application/json**

**Schema** [NewReferralMessage](#)  
(*on page 882*)

**Responses**

**201**

The post request was successful

**Headers**

Name	Description	Schema
Location	The location of the new resource	<b>type</b> string

**400**

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)  
(*on page 895*)

**500**

An internal server error occurred. Contact your administrator for more information

**Media types****application/json****Schema DefaultErrorModel***(on page 895)***default**

An unexpected error occurred. Check the error message for further information

**Media types****application/json****Schema DefaultErrorModel***(on page 895)***API methods: Update referral****PUT /v1/ees/referralrequests**

Update a referral for a client who is registered in Watson Care Manager.

Updates a specific client referral in Watson Care Manager. Watson Care Manager identifies the record to be updated based on the external identifiers that the external system provides in the body. A referral reason value must be provided using the text, referralReasonEsr, or otherReferralReason fields.

cURL

```
curl -X POST "https://host:port/Rest/v1/ees/referralrequest" -H "X-WCM-TENANT-ID: Tenant ID" -H
"X-WCM-TENANT-INSTANCE: Tenant Instance" -H "Authorization: access_token" -H "X-GRANT-TYPE: client_credentials"
-H "accept: application/json" -H "Referer: curam://foundational.app" -H "Authorization: access_token" -H
"X-GRANT-TYPE: client_credentials" -H "Content-Type: application/json" -d " { "resourceType": "ReferralRequest",
"source": { "coding": [ { "system": "http://wcm/source", "code": "T123" } ], "text": "Source" }, "originalSource":
{ "coding": [ { "system": "http://wcm/originalsource", "code": "wcm123" } ], "text": "OriginalSource" },
"date": "2018-01-01", "identifier": [ { "value": "1234", "type": { "text": "PHQ9" } } ], "referredToOrgUnit":
"extid123", "referredFromOrgUnit": "extid123", "reason": { "text": "Hypertension", "referralReasonEsr": "Hypertension", "otherReferralReason": "Hypertension" }, "description": "", "subject": { "reference": "PatientIdentifier=Passport&PatientIdentifierValue=P101" }, "priority": "medium", "date": "2018-02-02",
"serviceRequested": { "text": "Fitness Management Program" } } } "
```

JAVA

```
HttpResponse response = Unirest.post("https://host:port/Rest/v1/ees/referralrequest")

    .header("accept", "application/json")

    .header("Authorization", "access_token")

    .header("X-GRANT-TYPE", "client_credentials")

    .header("X-WCM-TENANT-INSTANCE", "Tenant Instance")

    .header("X-WCM-TENANT-ID", "Tenant ID")

    .header("Referer", "curam://foundational.app")

    .header("Content-Type", "application/json")

    .asString();
```

## Parameters

### **Referer(header)**

**type** string

**array** curam://foundational.app

**required** true

### **X-WCM-TENANT-ID(header)**

**type** string

**array** The tenant ID.

**required** true

### **X-WCM-TENANT-INSTANCE(header)**

**type** string

**array** The tenant instance.

**required** true

### **Authorization(header)**

**type** string

**array** The Access Token.

**required** true

**X-GRANT-TYPE**(*header*)

**type** string

**array** client\_credentials

**required** true

## Request body

The referral details.

**Required:**true

**Media types**

**application/json**

**Schema** [ModifiedReferralMessage](#)

*(on page 889)*

## Responses

**200**

The put request was successful

**Media types**

**application/json**

**Schema** [ModifiedReferralMessage](#)

*(on page 889)*

**400**

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 895)*

**500**

An internal server error occurred. Contact your administrator for more information

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 895)*

**default**

An unexpected error occurred. Check the error message for further information

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 895)*

## API methods: Update referral (by ID)

### PUT /v1/ees/referralrequests/{id}

Update a referral for a client who is registered in Watson Care Manager.

Updates a specific client referral in Watson Care Manager that matches the record ID sent from an external system. A referral reason value must be provided using the text, referralReasonEsr, or otherReferralReason fields. **Example request**

CURL

```
curl PUT -v -k -H  
'Content-Type: application/json' -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H  
"Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H 'Referer: curam//foundational.app'  
http://host:port/Rest/v1/ees/referralrequest/{id}
```

JAVA

```

HttpResponse response = Unirest.put("https://host:port/Rest/v1/ees/referralrequest/{id}
.header("accept", "application/json")
.header("Authorization", "access_token")
.header("X-GRANT-TYPE", "client_credentials")
.header("Referer", "curam://foundationalapp")
.body(" { \"resourceType": "ReferralRequest", "source": { "coding": [{ "system": "http://wcm/source", "code": "T123" }], "text": "Source" }, "originalSource": { "coding": [{ "system": "http://wcm/originalsource", "code": "wcm123" }], "text": "OriginalSource" }, "date": "2018-01-01", "identifier": [{ "value": "1234", "type": { "text": "PHQ9" } }], "referredToOrgUnit": "extiD123", "referredFromOrgUnit": "extid123", "reason": { "text": "Hypertension", "referralReasonEsr": "Hypertension", "otherReferralReason": "Hypertension" }, "description": "", "subject": { "reference": "PatientIdentifier=Passport&PatientIdentifierValue=P101" }, "priority": "medium", "date": "2018-02-02", "serviceRequested": { "text": "Fitness Management Program" } } } ) .asString();

```

## Parameters

### **Referer(header)**

**type** string

**array** curam://foundational.app

**required** true

### **X-WCM-TENANT-ID(header)**

**type** string

**array** The tenant ID.

**required** true

### **X-WCM-TENANT-INSTANCE(header)**

**type** string

**array** The tenant instance.

**required** true

### **Authorization(header)**

**type** string

**array** The Access Token.

**required** true

**X-GRANT-TYPE**(*header*)

**type** string

**array** client\_credentials

**required** true

**id**(*path*)

Internal record ID/WCM ID of the referral.

**type** string

**required** true

## Request body

The referral details.

**Required:**true

**Media types**

application/json

**Schema** [ModifiedReferralMessage](#)

(on page 889)

## Responses

**200**

The put request was successful

**Media types**

application/json

**Schema** [ModifiedReferralMessage](#)

(on page 889)

**400**

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

**Media types****application/json****Schema** [DefaultErrorModel](#)*(on page 895)***500**

An internal server error occurred. Contact your administrator for more information

**Media types****application/json****Schema** [DefaultErrorModel](#)*(on page 895)***default**

An unexpected error occurred. Check the error message for further information

**Media types****application/json****Schema** [DefaultErrorModel](#)*(on page 895)***API methods: Get referral (by ID)**

**GET /v1/ees/referralrequests/{id}**

Get external referral details for a client who is registered in Watson Care Manager.

Retrieves a specific client referral in Watson Care Manager that matches the record ID sent from an external system. **Example request**

cURL

```
curl GET -v -k -H
'Content-Type: application/json' -H "X-WCM-TENANT-ID: Tenant ID" -H "X-WCM-TENANT-INSTANCE: Tenant Instance" -H
"Authorization: access_token" -H "X-GRANT-TYPE: client_credentials" -H 'Referer: curam//foundational.app'
http://host:port/Rest/v1/ees/referralrequest/{id}
```

JAVA

```
HttpResponse response = Unirest.put("https://host:port/Rest/v1/ees/referralrequest/{id}
.header("accept", "application/json")
.header("X-WCM-TENANT-ID", "Tenant ID")
.header("X-WCM-TENANT-INSTANCE", "Tenant Instance") .header("Authorization",
"access_token") .header("X-GRANT-TYPE", "client_credentials") .header("Referer", "curam://
foundationalapp") .asString();
```

## Parameters

**Referer**(*header*)

**type** string

**array** curam://foundational.app

**required** true

**X-WCM-TENANT-ID**(*header*)

**type** string

**array** The tenant ID.

**required** true

**X-WCM-TENANT-INSTANCE**(*header*)

**type** string

**array** The tenant instance.

**required** true

**Authorization**(*header*)

**type** string

**array** The Access Token.

**required** true

**X-GRANT-TYPE**(*header*)

**type** string  
**array** client\_credentials

**required** true

**id**(*path*)

Internal record ID/WCM ID of the referral.

**type** string

**required** true

## Responses

**200**

The get request was successful

**Media types**

**application/json**

**Schema** [GetReferralMessage](#)

*(on page 884)*

**400**

The data request is invalid. Check the error message for further information and resend the request with the corrected data.

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 895)*

**500**

An internal server error occurred. Contact your administrator for more information

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 895)*

**default**

An unexpected error occurred. Check the error message for further information

**Media types**

**application/json**

**Schema** [DefaultErrorModel](#)

*(on page 895)*

## Components

### Schemas

#### NewReferralMessage

**Properties**

**resourceType** string

**description**

All referrals are of resource type ReferralRequest. This is a mandatory field.

**maxLength** 300

**id** string

**description**

Internal record ID/WCM ID of the referral. This is an optional field.

**priority** string

**description**

Priority of the referral - not set, high, medium, low. This is a mandatory field.

**maxLength** 300

**referredFromOrgUnit** string

<b>description</b>	External system reference of the organization unit from where the referral was received. This is a mandatory field if organization units are enabled.
<b>maxLength</b>	100
<b>referredToOrgUnit</b>	string
<b>description</b>	External system reference of the organization unit to where the referral is sent. This is a mandatory field if organization units are enabled.
<b>maxLength</b>	100
<b>date</b>	string( <i>date</i> )
<b>description</b>	The referral date. This is a mandatory field.
<b>description</b>	string
<b>description</b>	Comments. This is an optional field.
<b>maxLength</b>	2000
<b>source</b>	object
<b>description</b>	Contains the source details. System and code corresponding to the Source of the note. System would be http://wcm/sourcecode would be the external system reference of the Source. This is a mandatory field.
<b>\$ref</b>	<a href="#">NewCodeableConceptPR (on page 888)</a>
<b>originalSource</b>	object
<b>description</b>	Contains the original source system details. System and code corresponding to the Original Source System of the note. System would be http://wcm/originalsourcecode would be the external system reference of the Original Source System. This is an optional field.
<b>\$ref</b>	<a href="#">NewCodeableConceptPR (on page 888)</a>
<b>identifier</b>	array

<b>description</b>	The external ID of the referral record. This is an optional field.
<b>items</b>	<b>\$ref</b> <a href="#">NewIdentifier</a> <i>(on page 886)</i>
<b>reason</b>	object
<b>description</b>	The referral reason. This is a mandatory field.
<b>\$ref</b>	<a href="#">NewReferralReason</a> ( <i>on page 887</i> )
<b>serviceRequested</b>	object
<b>description</b>	The program suggestion for the referral. This is an optional field.
<b>\$ref</b>	<a href="#">NewServiceRequested</a> ( <i>on page 889</i> )
<b>subject</b>	object
<b>description</b>	A Subject object holds the reference to the Patient the record belongs to.
<b>\$ref</b>	<a href="#">NewSubject</a> ( <i>on page 888</i> )
<b>type</b>	object

## GetReferralMessage

### Properties

<b>referralID</b>	string
<b>description</b>	The referral resource id. This id uniquely identifies referral record for which the details are requested.
<b>priority</b>	string
<b>description</b>	Priority of the referral - not set, high, medium, low.
<b>maxLength</b>	300
<b>referredFromOrgUnit</b>	string

<b>referredToOrgUnit</b>	<p><b>description</b> External system reference of the organization unit from where the referral was received.</p> <p><b>maxLength</b> 100</p>
<b>referredOn</b>	<p><b>string</b></p> <p><b>description</b> External system reference of the organization unit to where the referral is sent.</p> <p><b>maxLength</b> 100</p>
<b>comments</b>	<p><b>string</b></p> <p><b>description</b> The referral date.</p> <p><b>maxLength</b> 2000</p>
<b>otherReferralReason</b>	<p><b>string</b></p> <p><b>description</b> Other referral reason.</p> <p><b>maxLength</b> 200</p>
<b>source</b>	<p><b>object</b></p> <p><b>description</b> Contains the source details. System and code corresponding to the Source of the note. System would be http://wcm/sourcecode would be the external system reference of the Source.</p> <p><b>\$ref</b> <a href="#">NewCodeableConceptPR (on page 888)</a></p>
<b>originalSource</b>	<p><b>object</b></p> <p><b>description</b> Contains the original source system details. System and code corresponding to the Original Source System of the note. System would be http://wcm/originalsourcecode would be the external system reference of the Original Source System.</p>

	<b>\$ref</b>	<a href="#">NewCodeableConceptPR (on page 888)</a>
<b>referralReason</b>	object	
	<b>description</b>	The referral reason. System and code corresponding to the referral reason. System would be http://wcm/referralreason would be the external system reference of the referral reason.
	<b>\$ref</b>	<a href="#">NewCodeableConceptPR (on page 888)</a>
<b>externalReferral</b>	object	
	<b>description</b>	The external referral. System and code corresponding to the external referral. System would be http://wcm/externalreferral would be the external system reference of the external referral.
	<b>\$ref</b>	<a href="#">NewCodeableConceptPR (on page 888)</a>
<b>subject</b>	object	
	<b>description</b>	A Subject object holds the reference to the Patient the record belongs to.
	<b>\$ref</b>	<a href="#">NewSubject (on page 888)</a>

**type** object

## NewIdentifier

### Properties

**value** string**description**

Optional. This attribute holds the external identifier value. If provided, a type text value must be provided.

**maxLength** 900**type** object**description**

Optional. This object holds the value for the Identifier type.

**\$ref** [NewCodeableConcept \(on page 887\)](#)

**type** object

## NewCodeableConcept

### Properties

**text** string

**description**

Optional. This attribute holds the value for the Identification type. It must be provided if an identifier value is provided.

**maxLength** 900

**type** object

## NewReferralReason

### Properties

**text** string

**description**

The referral reason. This field is currently available to support existing integrations. New integrations should use only the referralReasonEsr or otherReferralReason fields. If you use this field, any values that you provide in the referralReasonEsr or otherReferralReason fields are ignored. In addition, the Other Referral Reason in Watson Care Manager is set to the value that you provide in this field and the Referral Reason field is set to 'Other'.

**maxLength** 200

**referralReasonEsr** string

**description**

External system reference of the referral reason configured in Watson Care Manager.

**maxLength** 20

**otherReferralReason** string

**description**

Another reason for the referral if no external system reference is provided, or if the provided external system reference is

associated with the default Other referral reason configured in Watson Care Manager. Use this field to provide the other referral reason text.

**maxLength** 200

**type** object

## NewSubject

### Properties

**reference** string

**maxLength** 150

**type** object

## NewCodeableConceptPR

### Properties

**text** string

**maxLength** 900

**coding** array

**items** \$ref NewCodingPR

*(on page  
888)*

**type** object

## NewCodingPR

### Properties

**system** string

**maxLength** 900

**code** string

**maxLength** 900

**type** object

## NewServiceRequested

### Properties

**text** string

**description**

The suggested program.

**maxLength** 200

**type** object

## ModifiedReferralMessage

### Properties

**resourceType** string

**description**

All referrals are of resource type ReferralRequest. This is a mandatory field.

**maxLength** 300

**id** string

**description**

Internal record ID/WCM ID of the referral. This is an optional field if identifier is specified.

**priority** string

**description**

Priority of the referral - not set, high, medium, low. This is a mandatory field.

**maxLength** 300

**referredFromOrgUnit** string

**description**

External system reference of the organization unit from where the referral was received. This is a mandatory field if organization units are enabled.

**maxLength** 100

**referredToOrgUnit** string

	<b>description</b>	External system reference of the organization unit to where the referral is sent. This is a mandatory field if organization units are enabled.
	<b>maxLength</b>	100
<b>date</b>	string( <i>date</i> )	
	<b>description</b>	Referral date. This is a mandatory field.
<b>description</b>	string	
	<b>description</b>	Comments. This is an optional field.
	<b>maxLength</b>	2000
<b>source</b>	object	
	<b>description</b>	Contains the source details.System and code corresponding to the Source of the note.System would be http://wcm/sourcecode would be the external system reference of the Source. This is a mandatory field.
	<b>\$ref</b>	<a href="#">ModifiedCodeableConceptPR (on page 894)</a>
<b>originalSource</b>	object	
	<b>description</b>	Contains the original source system details.System and code corresponding to the Original Source System of the note.System would be http://wcm/originalsourcecode would be the external system reference of the Original Source System. This is an optional field.
	<b>\$ref</b>	<a href="#">ModifiedCodeableConceptPR (on page 894)</a>
<b>identifier</b>	array	
	<b>description</b>	The external ID of the referral record. This is an optional field if id is specified.
	<b>items</b>	<b>\$ref</b> <a href="#">ModifiedIdentifier (on page 891)</a>
<b>reason</b>	object	

	<b>description</b>	The referral reason. This is a mandatory field.
	<b>\$ref</b>	<a href="#">ModifiedReferralReason (on page 892)</a>
<b>serviceRequested</b>	<b>object</b>	
	<b>description</b>	The program suggestion for the referral. This is an optional field.
	<b>\$ref</b>	<a href="#">ModifiedServiceRequested (on page 894)</a>
<b>subject</b>	<b>object</b>	
	<b>description</b>	A Subject object holds the reference to the Patient the record belongs to.
	<b>\$ref</b>	<a href="#">ModifiedSubject (on page 893)</a>
<b>type</b>	<b>object</b>	

## ModifiedIdentifier

### Properties

**value** string

<b>description</b>	Optional This attribute holds the external identifier value. If provided, a type.text value must be provided.
--------------------	---------------------------------------------------------------------------------------------------------------

**maxLength** 900

**type** object

<b>description</b>	Opional. This object holds the value for the Identifier type.
--------------------	---------------------------------------------------------------

**\$ref** [ModifiedCodeableConcept \(on page 891\)](#)

**type** object

## ModifiedCodeableConcept

### Properties

**text** string

**description**

Optional. This attribute holds the value for the Identification type. It must be provided if an identifier value is provided.

**maxLength** 900

**type** object

## ModifiedReferralReason

### Properties

**text** string

**description**

The referral reason. This field is currently available to support existing integrations. New integrations should use only the referralReasonEsr or otherReferralReason fields. If you use this field, any values that you provide in the referralReasonEsr or otherReferralReason fields are ignored. In addition, the Other Referral Reason in Watson Care Manager is set to the value that you provide in this field and the Referral Reason field is set to 'Other'.

**maxLength** 200

**referralReasonEsr** string

**description**

External system reference of the referral reason configured in Watson Care Manager.

**maxLength** 20

**otherReferralReason** string

**description**

Another reason for the referral if no external system reference is provided, or if the provided external system reference is associated with the default Other referral reason configured in Watson Care Manager. Use this field to provide the other referral reason text.

**maxLength** 200

**type** object

## ModifiedSubject

### Properties

**reference** string

#### description

The Subject object is used to identify an individual in Watson Care Manager. The "reference" String is expected to contain identifier details that will be used to match an individual in Watson Care Manager. The string is parsed to extract query parameters and associated values. It can contain a combination of (1) WCM Patient ID (i.e. WCM Reference Number), (2) WCM Identification External System Reference and Identification number, (3) WCM Identification Type and Identification number, (4) WCM Identification External System Reference and Identification number and birthDate, (5) WCM Identification Type and Identification number and birthDate.

For example:

(1) WCM Patient ID

```
"subject":{  
    "reference" : "patient/123      " }
```

(2) WCM Identification External System Reference and Identification number

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239" }
```

(3) WCM Identification External System Reference and Identification number,

```
"subject":{  
    "reference" : "patient/identifier=Passport, identifiervalue=239" }
```

(4) WCM Identification External System Reference and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=xwz, identifiervalue=239,  
    birthDate=19380821" }
```

(5) WCM Identification Type and Identification number and birthDate,

```
"subject":{  
    "reference" : "patient/identifiercode=Passport, identifiervalue=239,  
    birthDate=19380821"  }
```

**maxLength** 150

**type** object

## ModifiedCodeableConceptPR

### Properties

**text** string

**maxLength** 900

**coding** array

**items \$ref** ModifiedCodingPR

*(on page 894)*

**type** object

## ModifiedCodingPR

### Properties

**system** string

**maxLength** 900

**code** string

**maxLength** 900

**type** object

## ModifiedServiceRequested

### Properties

**text** string

**description**

The suggested program.

**maxLength** 200

**type** object

## DefaultModelError

### Properties

**Error** array

```
items $ref Error (on  
page  
895)
```

**type** object

## Error

### Properties

**code** integer(*int32*)

**description**

A machine-readable code that identifies the problem. This code does not vary with the Accept-Language setting.

**message** string

**description**

A human-readable message. This message text is localized based on the Accept-Language setting of the request. The contents of this message text may change over time.

**level** string

**description**

The level of the error.

**type** object

**required**

- code
- message
- level

## Integrating Watson™ Care Manager with your organization's identity provider

By default, the IBM® App ID service authenticates users when they sign in to Watson™ Care Manager applications. If your organization has a Federated Identity Management arrangement with a third-party SAML identity provider like Keycloak, you can request that Watson™ Care Manager integrate with your identity provider. This means that your identity provider authenticates users' access to Watson™ Care Manager and other applications used by your organization, not IBM® App ID.

You can request that Watson™ Care Manager integrate with a single identity provider for your organization. With this integration, users can sign in to Watson™ Care Manager with the user ID or email address that is stored by your organization's identity provider. For example, a username that is associated with your organization and not Watson™ Care Manager only. Your identity provider determines and manages users' password reset process and password rules.

Assuming they have access to both applications, users can SSO between Watson™ Care Manager and the Watson™ Care Manager Reporting applications, without having to sign in separately to each. **Note:** This integration does not support SSO between Watson™ Care Manager applications and the Connect applications.

To take advantage of this integration, complete the procedure.

1. Request that Watson™ Care Manager integrate with your identity provider by submitting a case on the [Watson Health Support Portal](#).
2. Ensure that the items in [Required information to integrate with your organization's identity provider \(on page 897\)](#) are exchanged between you and Watson™ Care Manager. You must work with your IBM client executive to do this.
3. In addition, you must provide your IBM client executive with the details of a Security Administrator user for Watson™ Care Manager. You can nominate any user in your identity provider.
4. Then, onboard the user accounts from your identity provider to Watson™ Care Manager. Choose an option.
  - Automatically onboard the user accounts by using the Federated Users API.
    - a. Familiarize yourself with [Integrating via Watson Care Manager REST APIs \(on page 411\)](#). In particular, [API security and access \(on page 412\)](#).
    - b. Review the Federated Users API swagger documentation in the [Watson Care Manager REST API catalog \(on page 448\)](#).

- Alternatively, as a Security Administrator, you can manually onboard the user accounts to the Security Administrator workspace instead of using the API. For more information, see [Creating user accounts \(on page 897\)](#). The user's email address must match the email address that is stored by your identity provider.

Onboarded users can sign in to Watson™ Care Manager with their credentials that are stored by your organization's identity provider. For more information see [Signing in to your account with SSO \(on page 897\)](#).

## Required information to integrate with your organization's identity provider

For Watson™ Care Manager to complete this integration, you must provide information about your identity provider to us and we need to share information with you. You must agree the method of exchange for confidential information with your IBM client executive at the time of engagement.

### Information about your identity provider

You must provide the following information to us about your organization's identity provider:

- SAML entity ID - The globally-unique SAML entity ID for your organization's identity provider. To obtain the SAML entity ID, see your identity provider's user documentation.
- Sign-in URL - The URL to redirect users to for authentication purposes. When redirected to this URL, users are presented with your identity provider's sign-in page. To obtain this information, see your identity provider's user documentation.
- SAML certificate - The signing certificate from your organization's identity provider. Download the certificate from your identity provider and ensure that it is in .pem format.

### Information that you require from Watson™ Care Manager

Watson™ Care Manager provides App ID SAML XML metadata to you which includes its entity ID, App ID call back URL, and certificate. Use the information in the XML snippet to configure your organization's identity provider. For information about how to do this, see your identity provider's user documentation.

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