

Title (en)  
CLIENT MANAGEMENT TOOL SYSTEM AND METHOD

Title (de)  
SYSTEM UND VERFAHREN FÜR CLIENTVERWALTUNGSWERKZEUG

Title (fr)  
SYSTEME ET PROCEDE D'OUTIL DE GESTION DE CLIENTS

Publication  
**EP 3170114 A1 20170524 (EN)**

Application  
**EP 15822510 A 20150714**

Priority  
• US 201462025063 P 20140716  
• US 201514682836 A 20150409  
• US 2015040335 W 20150714

Abstract (en)  
[origin: WO2016010997A1] A client management tool system comprises a gateway module configured to provide access to a data store storing clinical and non-clinical data, a collection of computerized question forms configured to obtain additional data about a client, a social data model defining a structure to store and organize the client data, a predictive model including a plurality of weighted variables and thresholds in consideration of the client data to identify needs of the client and a valuation of services to address the client needs, a knowledgebase of available programs and service providers able to deliver the needed services, a client management toolkit configured to provide recommended a course of action in response to the identified client need, valuation, and available programs and services providers, and a data presentation module operable to present notifications, alerts, and outcome report related to service delivery to the client.

IPC 8 full level  
**G06F 19/00** (2011.01)

CPC (source: EP US)  
**G16H 50/20** (2017.12 - EP US); **G16H 50/50** (2017.12 - EP US)

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Designated extension state (EPC)  
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**WO 2016010997 A1 20160121**; CA 2955353 A1 20160121; EP 3170114 A1 20170524; EP 3170114 A4 20180711; EP 3910648 A1 20211117

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**US 2015040335 W 20150714**; CA 2955353 A 20150714; EP 15822510 A 20150714; EP 21175147 A 20150714