

IBM Cúram Social Program Management



Cúram Common Intake Configuration Guide

Version 6.05

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Note

Before using this information and the product it supports, read the information in "Notices" on page 27

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This edition applies to IBM Cúram Social Program Management v6.0 5 and to all subsequent releases unless otherwise indicated in new editions.

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Chapter 1. Introduction

1.1 Purpose

The purpose of this guide is to provide information on how to configure Cúram Common Intake to meet the needs of the organization. Cúram Common Intake (CCI) provides a means for the workers in an agency to carry out the functions required as part of the intake process in a cohesive and usable manner. It also facilitates agencies in providing a collaborative, 'No Wrong Door' approach to the intake process for clients applying for benefits. This reduces the number of contacts a client has to make in order to access benefits and/or services across multiple agencies, by providing workers with the facility to carry out the intake process across multiple programs.

Various configuration and development options are provided that allow an agency to configure CCI to meet its clients needs. This document describes these configuration options.

1.2 Audience

This guide should be read by developers and administrators who wish to configure Common Intake to provide an intake process for the organization. It is assumed that the administrators have worked with code tables as part of Cúram system administration, and that developers are familiar with typical Cúram development tasks.

1.3 Prerequisites

The reader should be familiar with both the basic elements of Social Enterprise Management and the functionality available in Cúram Common Intake.

1.4 Selected Reading

Table 1. Description of Related Reading

Document Name	Description
Cúram Common Intake Guide	This document provides a detailed overview of Cúram Common Intake functionality.
Cúram Priority, Complexity, Risk Configuration Guide	This guide describes the configuration options available for Priority, Complexity, Risk (PCR) processing.
Cúram Advisor Configuration Guide	This document describes Advisor configuration and development tasks related to the Advisor.

1.5 Chapters in this Guide

The following chapters are included in this guide:

Configuring the Intake Process

This chapter covers configuration options for the intake process.

Defining Triage

Triage definition is covered in this chapter.

Defining Screenings

This chapter covers the screening definition options.

Configuring Client Applications

This chapter covers client application configuration.

Chapter 2. Configuring the Intake Process

2.1 Introduction

Intake processes differ by agency. In particular, the intake process for needs-based programs such as cash assistance and unemployment benefits, differs greatly from the intake process for a protection-based program such as child welfare.

For needs-based programs, the client is usually required to fill out an application form, and the agency determines eligibility for programs based on the information provided in the application. Common Intake provides a intake process that can be configured to suit both protection and needs based programs.

For protection-based programs, the process is triggered by a report of abuse or neglect, resulting in the agency potentially investigating the report, and putting measures in place to ensure that the client is safe and not at risk of further abuse or neglect.

The intake process in Common Intake is represented by an XML document which is stored in the database. This XML document controls certain aspects of the behaviour of the application including certain flow of control aspects. Different users, or rather the applications assigned to those users, may be assigned different intake process XML documents in configuration, allowing for varying behaviour between those users.

2.2 Intake Process Definition

The intake process is defined in two database tables. The IntakeProcessName database table specifies a named intake process definition. This is a logical name which can be used to uniquely reference the intake process.

Associated with the IntakeProcessName database table is an entry in the IntakeProcessConfiguration database table. This database table contains the actual XML document which defines this particular intake process.

2.3 Assigning an Intake Process to a User

The intake process defined in the IntakeProcessName and IntakeProcessConfiguration database tables may be assigned to user roles. This is achieved by creating an entry in the IntakeProcessRoleAssignment database table and associating the intake process definition with an application code. As each user has one and only one application code associated with them, this creates an association between an intake process and all users with that application code.

System owned transactions, such as the deferred process instigated when an application is submitted, require access to a default intake process configuration. To ensure a configuration is available when the system need to access one, add an entry to the IntakeProcessRoleAssignment database table assigning a default intake process to the 'DefaultApp' application code.

2.4 Creating the Intake Process XML Document

In order for the Intake Process to have any behaviour, an intake process configuration XML document must be written. This is the XML document which will be loaded into the IntakeProcessConfiguration database table. To create this XML document:

- Create a new XML document and save it to a location on disk.

- The root tag of the XML document should be 'IntakeProcess'. Create an element with this name as the root element of the XML document.

2.5 Configuring Programs for an Intake Process

The intake process must be configured with a set of programs that are recognized for the intake. These programs are the only programs which will be supported by the intake process and must be explicitly declared in the XML document. To specify programs supported by the intake process, do the following:

- Open the XML document which represents the intake process configuration.
- Create or locate an XML element GlobalConfiguration as a direct child of the IntakeProcess element, i.e., as a direct child of the root element of the XML document. Only one global configuration element may exist in the document.
- For each program that the intake process supports, create an element ProgramType as a direct child of the GlobalConfiguration element with the following attributes:

Table 2. ProgramType Attributes.

This table describes the ProgramType element attributes for an intake

Attribute Name	Type	Purpose
ProgramType	CodeTableCode	This attribute contains an entry from the code table ProgramType. This code table specifies a program type, e.g., medical assistance. This attribute is mandatory and must be specified.
ProgramTypeID	Long	This attribute is used to integrate Common Intake with Cúram Universal Access . This attribute should contain the primary key of the database table ProgramType, which is used by Universal Access to specify the programs which it manages. This attribute should only be specified if ProgramType is also used for Universal Access, and only if integration with Universal Access is required.

2.5.1 Configuring a Description for a Program

Each program that is specified must have a display description specified. This is a short description of the programs purpose which is displayed to the user when viewing the program for selection on list pages in the application. This text is configured in a property file that is loaded in to the resource store. To configure the descriptions:

- Create a property file resource in the resource store with the following name <IntakeProcessName>GlobalConfiguration.
 - <IntakeProcessName> should be replaced with the logical name of the Intake Process as stored in the IntakeProcessName database table.
- For each program that requires a description, create a property in the property file with the following name: <ProgramTypeCode>.Description and specify the description text as the value of the property.
 - <ProgramTypeCode> should be replaced with the code from the ProgramType code table that represents the Program.

2.6 Configuring Initial Contact with the Individual

Initial contact occurs when a person walks into the organization's office to discuss their needs. The worker then searches for the person and locates their participant record (if one exists), or registers them.

Once the person record has been found, the worker is presented with the individual's home page, which presents a summary of the person's intake so far. They are also presented with several tabs for the person allowing them to perform several functions such as recording a triage, performing a screening, recording a life event, etc. These are all configurable as described in the section below.

2.6.1 Configuring the Intake Summary

The intake summary provides a view of the users history relevant to Common Intake. The Intake Summary page is generally not configurable. It does, however, have one configurable aspect. It is possible to specify which clusters should be displayed for the intake configuration. To do this:

- Open the XML document which represents the intake process configuration.
- Create or locate an XML element `IndividualConfiguration` as a direct child of the `IntakeProcess` element, i.e., as a direct child of the root element of the XML document. Only one `IndividualConfiguration` element may exist in the document.
- Create or locate an XML element `IntakeSummary` as a direct child of the `IndividualConfiguration` element previously located.

On this element the following attributes can be specified which configure the behaviour of the Intake Summary page.

Table 3. Intake Summary Attributes.

This table describes configuration attributes for the Intake Summary page.

Attribute Name	Type	Purpose
ShowPendingApplicationCluster	Boolean	This attribute controls whether or not the list of pending applications will be displayed on the home page. If set to true the cluster will be displayed and if set to false the cluster will not be displayed. Any other settings may result in undefined or unexpected behaviour.
ShowCurrentCluster	Boolean	This attribute controls whether or not the list of current cases associated with the Individual will be displayed on the home page. If set to true the cluster will be displayed and if set to false the cluster will not be displayed. Any other settings may result in undefined or unexpected behaviour.

Note: It is, of course, possible to use standard customization techniques to replace the Common Intake version of this page with a custom version. This can be achieved using the standard approach for customizing UIM pages. There are two consequences to this approach, which should be considered prior to taking it:

- As the approach overrides the version shipped by Cúram, the configurable settings will not necessarily take effect on the custom page defined, unless the same approach to the page development is taken.

- Most importantly, future updates to the page made by Cúram will not automatically appear in the customized page. As a result future improvements to this page and the configurability of this page will not be immediately available.

2.6.2 Configuring the Cases View for an Individual

As part of the intake process for an individual a Cases tab is available which allows any cases associated with the client to be viewed. Certain information on this tab is configurable and these configurations are described below. To configure the cases view for an individual do the following:

- Open the XML document which represents the intake process configuration.
- Create or locate an XML element IndividualConfiguration as a direct child of the IntakeProcess element, i.e., as a direct child of the root element of the XML document. Only one IndividualConfiguration element may exist in the document.
- Create or locate an XML element ShowExistingCase as a direct child of the IndividualConfiguration element previously located.

2.6.2.1 Configuring Case Preview Panels

Preview panels for the cases listed in the Cases tab can be configured based on case type as follows:

- For each preview panel you wish to configure on the individual cases list, create an element PreviewPanel as a direct child of ShowExistingCase.
- On this element the following attributes can be specified which will configure the page to display on the individual cases list preview panel for the defined case type:

Table 4. PreviewPanel Attributes.

This table describes configuration attributes for the individual tab case preview panels.

Attribute Name	Type	Purpose
caseType	Code Table Entry	This attribute contains an entry from the case type code table.
Page	String	This attribute contains the name of the client page that will be used for the preview panel.

2.6.2.2 Configuring Case Types

The types of cases displayed on the list can be configured as follows:

- For each case type you wish to display on the individual cases list, create an element ShowCasesOfType as a direct child of ShowExistingCase.
- On this element the following attribute can be specified which will configure the type of case to be displayed on the individual cases list:

Table 5. ShowCasesOfType Attributes.

This table describes configuration attributes for the types of cases on the individual tab cases list.

Attribute Name	Type	Purpose
Type	Code Table Entry	This attribute contains an entry from the case type code table.

2.6.2.3 Configuring Case Statuses

Case statuses that will be displayed on the Cases tab can be configured as follows:

- For each case status you wish to display on the individual cases list, create an element ShowCasesOfStatus as a direct child of ShowExistingCase.

- On this element the following attribute can be specified which will configure the status of case to be displayed on the individual cases list:

Table 6. ShowCasesOfStatus Attributes.

This table describes configuration attributes for the statuses of cases on the individual tab cases list.

Attribute Name	Type	Purpose
Status	Code Table Entry	This attribute contains an entry from the case status code table.

2.6.2.4 Configuring Undisposed Applications

Whether or not cases with undisposed applications should be displayed can be configured as follows:

- Create an element ShowCasesWithUndisposedApplication as a direct child of ShowExistingCase.
- On this element the following attribute can be specified which will configure whether cases with undisposed applications will be displayed on the individual cases list.

Table 7. ShowCasesWithUndisposedApplications Attributes.

This table describes configuration attributes defining whether cases with undisposed applications should be displayed or not.

Attribute Name	Type	Purpose
Value	Boolean	This attribute controls whether cases with undisposed applications will be displayed on the individual cases list or not.

2.7 Configuring the Case Quick Search

The results of the quick search for cases are configurable for the intake process. To configure the case quick search results do the following:

- Open the XML document which represents the intake process configuration.
- Create or locate the XML element ExistingCase as a direct child of the IntakeProcess element.
- Create or locate an XML element QuickSearch as a direct child of the ExistingCase element.

2.7.1 Configuring Case Quick Search Preview Panels

Preview panels for the cases in the results list can be configured based on case type as follows:

- For each preview panel you wish to configure on the search create an element PreviewPanel as a direct child of QuickSearch.
- On this element the following attributes can be specified which will configure the page to display in the quick search results preview panel for the defined case type:

Table 8. PreviewPanel Attributes.

This table describes configuration attributes for the case quick search preview panels.

Attribute Name	Type	Purpose
caseType	Code Table Entry	This attribute contains an entry from the case type code table.
Page	String	This attribute contains the name of the client page that will be used for the preview panel.

2.7.2 Configuring Case Types

The types of cases that will be displayed on the case quick search results can be configured as follows:

- For each case type you wish to display in the quick search results create an element ShowCasesOfType as a direct child of QuickSearch.
- On this element the following attribute can be specified which will configure the type of case to be displayed in the quick search results:

Table 9. ShowCasesOfType Attributes.

This table describes configuration attributes for the types of cases on the individual tab cases list.

Attribute Name	Type	Purpose
Type	Code Table Entry	This attribute contains an entry from the case type code table.

2.7.3 Configuring Case Statuses

The statuses of cases that will be displayed on the case quick search results can be configured as follows:

- For each case status you wish to display in the quick search results create an element ShowCasesOfStatus as a direct child of QuickSearch.
- On this element the following attribute can be specified which will configure the status of case to be displayed in the quick search results:

Table 10. ShowCasesOfStatus Attributes.

This table describes configuration attributes for the statuses of cases on the individual tab cases list.

Attribute Name	Status	Purpose
Type	Code Table Entry	This attribute contains an entry from the case status code table.

2.7.4 Configuring Undisposed Applications

Whether or not cases with undisposed applications should be displayed can be configured as follows:

- Create an element ShowCasesWithUndisposedApplication as a direct child of QuickSearch.
- On this element the following attribute can be specified which will configure whether cases with undisposed applications will be displayed on the cases quick search results.

Table 11. ShowCasesWithUndisposedApplications Attributes.

This table describes configuration attributes defining whether cases with undisposed applications should be displayed or not.

Attribute Name	Type	Purpose
Value	Boolean	This attribute controls whether cases with undisposed applications will be displayed on the cases quick search results list or not.

Chapter 3. Defining Triage

3.1 Introduction

Triage allows a case worker to quickly gauge a client's needs when they phone or visit by asking a core set of fundamental questions. The result allows the case worker to understand the client's situation in relation to the core needs. A triage can be performed by the case worker resulting in a list of suitable services, service providers, and programs to help meet the client's needs.

3.2 Setting up a Triage Definition

- Open the XML document which represents the intake process definition - see Appendix A.
- Create or locate an XML element `IndividualConfiguration` as a direct child of the `IntakeProcess` element.

Note: Only one `IndividualConfiguration` element may exist in the document.

- Create or locate an XML element `Triage` as a direct child of the `IndividualConfiguration` element previously located.
- On this element the following attributes can be specified which will define the Triage process:

Table 12. Triage Attributes.

This table describes the attributes for a triage definition:

Attribute Name	Type	Purpose
<code>DataStore</code>	String	This attribute specifies the name of the datastore schema to be used for the IEG script that will be executed to capture the details of the triage.
<code>RuleSet</code>	String	This attribute specifies the name of the CER rule set to be used to process the answers from the script into recommendations for programs and services.
<code>RuleSetClass</code>	String	This attribute specifies the name of the CER rule class in the CER rule set which is used to calculate the recommendations of the triage.
<code>ScriptName</code>	String	This attribute specifies the name of the IEG script which will be used to capture the details of the triage.
<code>ScriptType</code>	String	This attribute specifies the type of IEG script which will be used to capture the details of the triage.
<code>ScriptVersion</code>	String	This attribute specifies the type of IEG script which will be used to capture the details of the triage.

3.3 Adding Urgent Alerts to the Rule Set

To output an urgent alert from the CER rule set, the rule class defined in the triage definition should have an attribute named `alertMessages`. This attribute has as its type a list of rule classes of type `AlertMessage`. Each `AlertMessage` which is calculated and passed into this list will appear as an urgent alert on the Triage Result page in the application.

3.4 Recommending Services

To recommend a service from the CER rule set, the rule class specified in the triage definition should have an attribute named `services`. This attribute has as its type a list of rule classes which subclass the `AbstractService` type. Each `AbstractService` which is calculated and passed into this list will appear as a recommended service on the Triage Result page in the application.

3.5 Recommending Programs

To recommend a program from the CER rule set, the rule class defined as part of triage definition should have an attribute named `programs`. This attribute has as its type a list of rule classes which subclass the type `AbstractProgram`. Each `AbstractProgram` which is calculated and passed into this list will appear as a recommended program on the Triage Result page in the application.

Chapter 4. Defining Screenings

4.1 Introduction

Screening allows a client to determine if they are potentially eligible for one or more programs based on a set of high level, guided questions. Potential eligibility for the selected programs is determined by running eligibility rules against the client's responses to the questions.

4.2 Setting up a Screening Definition

- Open the XML document which represents the intake process definition - see Appendix A.
- Create or locate an XML element `IndividualConfiguration` as a direct child of the `IntakeProcess` element. Only one `IndividualConfiguration` element may exist in the document.
- Create or locate an XML element `Screening` as a direct child of the `IndividualConfiguration` element previously located. There can be as many `Screening` elements as are required.
- On this element the following attributes can be specified which are used to define the screening process.

Table 13. Screening Attributes.

This table describes the attributes that can be set for a screening definition.

Attribute Name	Type	Purpose
Type	Code Table Entry	This attribute specifies the category of screening. The category is an entry from the <code>ScreeningCategory</code> code table. Only one screening script can be specified for each screening category, and as such this is a unique attribute.
DataStore	String	This attribute specifies the name of the data store schema to be used for the IEG script that is executed to capture the details of the screening.
RuleSet	String	This attribute specifies the name of the CER rule set to be used to process the answers from the screening script into recommendations for programs.
RuleSetClass	String	This attribute specifies the name of the CER rule class in the CER rule set which is used to calculate the recommendations of the screening.
ScriptName	String	This attribute specifies the name of the IEG script which is used to capture the details of the triage.
ScriptVersion	String	This attribute specifies the type of IEG script which will be used to capture the details of the triage.

4.3 Adding Urgent Alerts to the Rule Set

To output an urgent alert from the CER rule set, the rule class defined in the screening definition should have an attribute named `alertMessages`. This attribute has as its type a list of rule classes of type `AlertMessage`. Each `AlertMessage` which is calculated for this list appears as an urgent alert on the Triage Result page in the application.

4.4 Recommending Programs

To recommend a program from the CER rule set, the rule class defined in the screening definition should have an attribute named `programs`. This attribute has as its type a list of rule classes which subclass the type `AbstractProgram`. Each `AbstractProgram` which is calculated into this list will appear as a recommended program on the screening result page in the application.

4.4.1 Specifying whether Programs are Available Internally or Externally

Each program that is output from the screening may be available internally or externally. If the program is available internally, then a link to start the application script is displayed; if the program is available externally, then a link to refer the client to the external agency will be displayed. Screening results behaviour can be defined to specify whether specific programs are available internally or externally. To achieve this:

- Open the XML document which represents the intake process definition.
- Locate the XML element `Screening` which is to be defined.
- For each program that the intake process will support, create an element `ProgramType` as a direct child of the `Screening` element.

Table 14. ProgramType Attributes for a Screening.

This table describes the attributes that can be set for the `ProgramType` element for a screening.

Attribute Name	Type	Purpose
<code>ProgramType</code>	Code Table Entry	This attribute should contain an entry from the code table 'ProgramType'. This is a code table which specifies a program type, e.g. medical assistance. This attribute is mandatory and must be specified.
<code>Availability</code>	String	This attribute should contain the value 'internal' if the program is available internally or 'external' if the program is available from a different agency.

Chapter 5. Configuring Client Applications

5.1 Introduction

In order to file a claim for benefits for most needs-based programs, a client must submit an application, providing required information on personal details, income, expenses, employment, education etc. When an application is submitted, there are a number of processing steps which are carried out either manually by the worker, or automatically by the system, depending on the agency and the program. Each of these steps are configurable. Application routing configuration options are also available. These are described below.

5.2 Setting up the Application Configuration

- Open the XML document which represents the Intake Process Configuration.
- Create or locate an XML element `ApplicationConfiguration` as a direct child of the `IntakeProcess`, or as a root element. There can only be one `ApplicationConfiguration` element per document.
- For each application to be handled by the Intake Process, create an XML element `ApplicationType` as a direct child of the `ApplicationConfiguration` element previously located. There can be as many `ApplicationType` elements specified as required.
- On this element the following attributes can be specified which will configure the Application process for that application type:

Table 15. ApplicationType Attributes for an Application.

This table describes the attributes that can be set for the `ApplicationType` element for an application.

Attribute Name	Type	Purpose
Type	Code Table Entry	This attribute specifies the type of application that this element represents. The type is an entry from the <code>ApplicationType</code> code table. Only one application script can be specified for each <code>ApplicationType</code> , and as such this is a unique attribute.
ShowPreviewPanel	String	This attribute specifies whether or not a preview panel should be displayed for this type of application on the Application List Page in Common Intake.

5.3 Configuring the Script Details

- Open the XML document which represents the intake process configuration.
- Locate the XML element `ApplicationType` which represents the application type to be configured.
- Create or locate an XML element `ApplicationScript` as a direct child of the `ApplicationType` element.
- On this element the following attributes can be specified which will configure the application script for that application type:

Table 16. ApplicationScript Attributes for an Application.

This table describes the attributes that can be set for the application Script.

Attribute Name	Type	Purpose
SchemaName	String	This attribute specifies the name of the data store schema to be used for the IEG script that is executed to capture the details of the application.
ScriptName	String	This attribute specifies the name of the IEG Script which is used to capture the details of the application.
ScriptVersion	String	This attribute specifies which version of the named IEG script to use to capture the details of the application.
SimpleScriptName	String	This attribute specifies the name of the IEG script which will be used to capture the details of the application. This differs from the ScriptName attribute, in that it is used where a case already exists, while the script specified in the ScriptName attribute is used when no existing case already exists. This may or may not be the same script that is specified in the ScriptName attribute and is present to allow more flexibility of configuration.

5.4 Configuring the Programs Covered by an Application Type

- Open the XML document which represents the intake process configuration.
- Locate the XML element ApplicationType which represents the application type to be configured.
- Create or locate an XML element ProgramType as a direct child of the ApplicationType element.
- On this element the following attributes can be specified which configure the application script for that application type.

Table 17. ProgramType Attributes.

This table describes the ProgramType Attributes for an Application.

Attribute Name	Type	Purpose
type	Code Table Entry	An entry from the program type code table.
isReopenAllowed	Boolean	This attribute controls whether the reopen program option will be available in the row action menu on the Programs list page. If set to true the "Reopen" action will be enabled for denied or withdrawn program applications. If set to false the "Reopen" action will be disabled.

Table 17. ProgramType Attributes (continued).

This table describes the ProgramType Attributes for an Application.

Attribute Name	Type	Purpose
isResumeTimerEnabled	Boolean	This attribute controls whether the whether a program application timer resumes on reopening a denied or withdrawn program application. If set to true the timer will not resume on reopening. If set to false the timer will not resume on reopening.
MaxNumberReopenings Allowed	Integer	This attribute specifies the number of times it is possible to reopen an application.
TimerRestartDate	Code Table Entry	This attribute specifies the type of date that will be used to resume the timer. The date type is an entry from the TimerRestartDate code table.

5.4.1 Configuring the Program Mapping

- Create or locate an XML element ProgramMapping as a direct child of the ProgramType element.
- On the ProgramMapping element the following attributes can be specified.

Table 18. ProgramMapping Attributes.

This table describes ProgramMapping attributes.

Attribute Name	Type	Purpose
IntegratedCaseType	Code Table Entry	This attribute specifies the type of Integrated Case to create if this Program Type was applied for.
MappingXML	String	This attribute specifies the Mapping XML file to be used to map the data from the script into evidence on the integrated case that is created.
MappingXMLConfiguration	String	This attribute specifies the mapping configuration XML file to be used to map the data from the script into evidence on the integrated case that is created.

5.4.2 Adding a Timer for the Program

The timer functionality in Common Intake is based upon milestones functionality. A 'timer' milestone can be configured to be started when an application for a program is submitted. To achieve this:

- Create or locate an XML element Milestone as a direct child of the ProgramType element.
- On the Milestone element the following attributes can be specified:

Table 19. Milestone Attributes.

This table describes Milestone attributes.

Attribute Name	Type	Purpose
ID	Long	This attribute specifies the primary key of the milestone to be created when this particular program is applied for.

Note: A milestone configuration record contains an Earliest Start Day field (specified in days) to support functionality for case and service plan milestones. This field is defined as "The shortest time in days that this milestone can start after the service plan or case start date.". If it is set to anything other than 0 for an application program timer it has the effect of extending the timer by the specified number of days.

5.5 Integrating the Application with Universal Access

Applications can be received either via the case worker in Common Intake, or via IBM Cúram Universal Access (UA). Common Intake can be configured so that when an application is received from UA the Application becomes a Common Intake Application and may be processed by the case worker in the same way as if it had been captured using Common Intake.

To configure Common Intake to pick up an application from UA:

- Open the XML document which represents the intake process configuration.
- Locate the XML element ApplicationType which represents the application type to be configured.
- Create or locate an XML element IntakeApplicationType as a direct child of the ApplicationType element. Only one IntakeApplicationType element may be specified per ApplicationType.
- On the IntakeApplicationType element the following attributes can be specified.

Table 20. IntakeApplicationType Attributes.

This table describes the attributes for the IntakeApplicationType element.

Attribute Name	Type	Purpose
MappedType	Long	This attribute specifies the primary key of a record in the IntakeApplicationType database table in Workspace Services. With this configured, Common Intake will automatically pick up applications that are based on this IntakeApplicationType and present it as an application for processing to the case worker.

5.6 Configuring Workflows for Application Processing

Common Intake supports the configuration of workflows for the assignment of applications and related tasks to workers. Workflows can be configured to reflect the workflow process the organization requires.

Common Intake ships with three basic starter workflows which can be used to get up and running quickly.

To configure a workflow to be used for a particular application, the following steps should be followed:

- Open the XML document which represents the intake process configuration.

- Locate the XML element `ApplicationType` which represents the application type to be configured.
- Create or locate an XML element `Workflows` as a direct child of the `ApplicationType` element. Only one workflow element may be specified per `ApplicationType`.
- Create or locate an XML element `OnlineApplicationRecieved` as a direct child of the `Workflows` element. This has one supported attribute, `name`, which is the name of the workflow to be enacted when an online application is received from UA.
- Create or locate an XML element `WithdrawalRequest` as a direct child of the `Workflows` element. This has one supported attribute, `name`, which is the name of the workflow to be enacted when a withdrawal request is received from UA.
- Create or locate an XML element `ReadyForDetermination` as a direct child of the `Workflows` element. This has one supported attribute, `name`, which is the name of the workflow to be enacted when the application transitions to a status of ready for determination.
- Create or locate an XML element `ReassignApplicationNotification` as a direct child of the `Workflows` element. This has one supported attribute, `name`, which is the name of the workflow to be enacted when the application owner is reassigned.

5.6.1 Configuring an Application Workflow Allocation Target

Each of the workflow elements, `OnlineApplicationRecieved`, `WithdrawalRequest`, and `ReadyForDetermination` has a child element of type `AllocationTarget`. To configure the allocation target of one of the application workflows, the following steps should be taken:

- Open the XML document which represents the intake process configuration.
- Locate the XML element `ApplicationType` which represents the application type to be configured.
- Locate an XML element `Workflow` as a direct child of the `ApplicationType` element.
- Locate one of the workflow elements detailed above.
- Create or locate an XML element `AllocationTarget`.
- On the `AllocationTarget` element the following attributes can be specified:

Table 21. AllocationTarget Attributes.

This table describes the attributes for the `AllocationTarget` element.

Attribute Name	Type	Purpose
Type	Code Table Entry	An entry from the target item type code table. Supported target item types are: work queue and user.
Name	String	If the type attribute is set to user, this attribute should specify the user's name. Alternatively if the type is set to work queue this attribute should contain the primary key of the database table <code>WorkQueue</code> .

5.7 Configuring the Texts associated with an Application

5.7.1 Rights and Responsibilities Text

Each application that is run via Common Intake must have a rights and responsibilities text specified. This is the text that appears in the application prior to the case worker submitting the application script. The case worker is required to confirm that the text has been communicated to the individual applying for the program prior to continuing. To configure the rights and responsibilities text:

- Create a property file resource in the resource store with the following name:
<IntakeProcessName>.ApplicationConfiguration.<ApplicationType>.RightsAndResponsibilitiesText
 - <IntakeProcessName> should be replaced with the logical name of the intake process as stored in the IntakeProcessName database table.
 - <ApplicationType> should be replaced with the code table code of the application type that this rights and responsibilities text is for.
- Create a property in the property file with the name DisplayText and specify the text to be displayed as the value of the property.
- Note that the value of the property can contain HTML to format the display text appropriately and provide a rich text feel.

5.7.2 Authorization Information Text

Authorization information text appears in the application prior to the case worker submitting the application script. The case worker is required to confirm that the text has been communicated to the individual applying for the program prior to continuing. This text is configured in an identical fashion to the rights and responsibilities text except that the name of the property file resource is different. In this case, the property file should be named:

- <IntakeProcessName>.ApplicationConfiguration.<ApplicationType>.AuthorizationInformationText
 - <IntakeProcessName> should be replaced with the logical name of the intake process as stored in the IntakeProcessName database table.
 - <ApplicationType> should be replaced with the code table code of the application type that this rights and responsibilities text is for.

5.7.3 Department Policy Text

Department policy text appears in the application prior to the case worker submitting the application script. The case worker is required to confirm that the text has been communicated to the individual applying for the program prior to continuing with submission. This text is configured in an identical fashion to the rights and responsibilities text except that the name of the property file resource is different. In this case, the property file should be named:

- <IntakeProcessName>.ApplicationConfiguration.<ApplicationType>.DepartmentPolicyText
 - <IntakeProcessName> should be replaced with the logical name of the Intake Process as stored in the IntakeProcessName database table.
 - <ApplicationType> should be replaced with the code table code of the Application Type that this rights and responsibilities text is for.

5.8 Configuring Cases to which the Application can be Transferred

Is is possible to configure the cases that the application can be transferred to. To do this perform the following:

- Open the XML document which represents the intake process configuration.
- Locate the XML element ApplicationType which represents the application type to be configured.
- Create or locate an XML element TransferToExistingCase as a direct child of the ApplicationType element.

5.8.1 Configuring Case Types

The types of cases that the application can be transferred to can be configured as follows:

- For each case type you wish to allow the application to be transferred to create an element CaseType as a direct child of TransferToExistingCase.

- On this element the following attribute can be specified which will configure the type of case that an application can be transferred to:

Table 22. CaseType Attributes.

This table describes configuration attributes for the types of cases that the application can be transferred to.

Attribute Name	Type	Purpose
Type	Code Table Entry	This attribute contains an entry from the case type code table.

5.8.2 Configuring Case Statuses

The statuses of cases that the application can be transferred to can be configured as follows:

- For each case status you wish to allow the application to be transferred to create an element CaseStatus as a direct child of TransferToExistingCase.
- On this element the following attribute can be specified which will configure the status of case that an application can be transferred to:

Table 23. CaseStatus Attributes.

This table describes configuration attributes for the statuses of cases that the application can be transferred to.

Attribute Name	Type	Purpose
Status	Code Table Entry	This attribute contains an entry from the case status code table.

5.8.3 Configuring Application Statuses

The statuses of the applications that can be transferred can be configured as follows:

- For each application status for which you wish to allow it to be transferred create an element ApplicationStatus as a direct child of TransferToExistingCase.
- On this element the following attribute can be specified which will configure the status of application that can be transferred:

Table 24. ApplicationStatus Attributes.

This table describes configuration attributes for the statuses of application that can be transferred.

Attribute Name	Type	Purpose
Status	Code Table Entry	This attribute contains an entry from the application status code table.

5.9 Configuring the Cases View for the Application

The application workspace contains a Cases tab which allows cases associated with the application to be viewed. Certain information on this tab is configurable. These configurations are described below. To configure the cases view for the application do the following:

- Open the XML document which represents the intake process configuration.
- Locate the XML element ApplicationType which represents the application type to be configured.
- Create or locate an XML element ShowExistingCase as a direct child of the ApplicationType element.

5.9.1 Configuring Case Preview Panels

Preview panels for the cases in the list can be configured based on case type as follows:

- Create or locate an XML element `PreviewPanel` as a direct child of the `ShowExistingCase` element.
- On this element the following attribute can be specified which will configure the page to display in the preview panel for records on the application cases list:

Table 25. *PreviewPanel* Attributes.

This table describes configuration attributes for the application cases tab preview panels.

Attribute Name	Type	Purpose
Page	String	This attribute contains the name of the client page that will be used for the preview panel.

5.9.2 Configuring Case Types

The types of cases that will be displayed on the list can be configured as follows:

- For each case type you wish to display on the application cases list, create an element `ShowCasesOfType` as a direct child of `ShowExistingCase`.
- On this element the following attribute can be specified which will configure the type of cases to be displayed on the application cases list:

Table 26. *ShowCasesOfType* Attributes.

This table describes configuration attributes for the types of cases on the application tab cases list.

Attribute Name	Type	Purpose
Type	Code Table Entry	This attribute contains an entry from the case type code table.

5.9.3 Configuring Case Statuses

The statuses of cases that will be displayed on the list can be configured as follows:

- For each case status you wish to display on the application cases list, create an element `ShowCasesOfStatus` as a direct child of `ShowExistingCase`.
- On this element the following attribute can be specified which will configure the status of cases to be displayed on the application cases list:

Table 27. *ShowCasesOfStatus* Attributes.

This table describes configuration attributes for the statuses of cases on the application tab cases list.

Attribute Name	Type	Purpose
Status	Code Table Entry	This attribute contains an entry from the case status code table.

5.9.4 Configuring Undisposed Applications

Whether or not cases with undisposed applications should be displayed can be configured as follows:

- Create an element `ShowCasesWithUndisposedApplication` as a direct child of `ShowExistingCase`.
- On this element the following attribute can be specified which will configure whether cases with undisposed applications will be displayed on the application cases list.

Table 28. ShowCasesWithUndisposedApplications Attributes.

This table describes configuration attributes defining whether cases with undisposed applications should be displayed or not.

Attribute Name	Type	Purpose
Value	Boolean	This attribute controls whether cases with undisposed applications will be displayed on the individual cases list or not.

5.10 Configuring the Cases to which the Application can be Added

It is possible to configure the cases that an application can be added to. To configure the cases that the application can be added to do the following:

- Open the XML document which represents the intake process configuration.
- Locate the XML element ApplicationType which represents the application type to be configured.
- Create or locate an XML element AddToExistingCase as a direct child of the ApplicationType element.

5.10.1 Configuring Case Types

The types of cases that the application can be added to can be configured as follows:

- For each case type you wish to allow the application to be added to create an element AddToCaseOfType as a direct child of AddToExistingCase.
- On this element the following attribute can be specified which will configure the type of case that an application can be added to:

Table 29. AddToCaseOfType Attributes.

This table describes configuration attributes for the types of cases that the application can be added to.

Attribute Name	Type	Purpose
Type	Code Table Entry	This attribute contains an entry from the case type code table.

5.10.2 Configuring Case Statuses

The statuses of cases that the application can be added to can be configured as follows:

- For each case status you wish to allow the application to be added to create an element AddToCaseOfStatus as a direct child of AddToExistingCase.
- On this element the following attribute can be specified which will configure the status of case that an application can be added to:

Table 30. AddToCaseOfStatus Attributes.

This table describes configuration attributes for the statuses of cases that the application can be added to.

Attribute Name	Type	Purpose
Status	Code Table Entry	This attribute contains an entry from the case status code table.

5.11 Configuring the Case Status after the Application has been Transferred.

It is possible to configure what the status of the case will be after the application has been transferred. To configure the case status after the application had been transferred do the following:

- Open the XML document which represents the intake process configuration.
- Locate the XML element ApplicationType which represents the application type to be configured.
- Create or locate an XML element CaseStatusAfterTransfer as a direct child of the ApplicationType element.
- On this element the following attribute can be specified which will configure the status the case should take after the application is transferred:

Table 31. CaseStatusAfterTransfer Attributes.

This table describes configuration attributes for the status the case should take after application transfer.

Attribute Name	Type	Purpose
status	Code Table Entry	This attribute contains an entry from the case status code table.

5.11.1 Configuring Case Types

The types of cases that will take the new status after the application has been transferred can be configured as follows:

- For each case type whose status you wish to update after application transfer, create an element CaseType as a direct child of CaseStatusAfterTransfer.
- On this element the following attribute can be specified which will configure the type of case whose status will change:

Table 32. CaseType Attributes.

This table describes configuration attributes for the types of cases whose status will change after application transfer.

Attribute Name	Type	Purpose
status	Code Table Entry	This attribute contains an entry from the case type code table.

5.12 Configuring the Case Status after the Application Transferral had been Undone

It is possible to configure what the status of the case will be after the application transfer has been undone. To configure the case status after the application transfer has been undone do the following:

- Open the XML document which represents the intake process configuration.
- Locate the XML element ApplicationType which represents the application type to be configured.
- Create or locate an XML element CaseStatusAfterUndoTransfer as a direct child of the ApplicationType element.
- On this element the following attribute can be specified which will configure the status the case should take after the application transfer has been undone:

Table 33. CaseStatusAfterUndoTransfer Attributes.

This table describes configuration attributes for the status the case should take after application transfer has been undone.

Attribute Name	Type	Purpose
status	Code Table Entry	This attribute contains an entry from the case status code table.

5.12.1 Configuring Case Types

The types of cases that will take the new status after an application transfer has been undone can be configured as follows:

- For each case type whose status you wish to update after an application transfer has been undone, create an element CaseType as a direct child of CaseStatusAfterUndoTransfer.
- On this element the following attribute can be specified which will configure the type of case whose status will change:

Table 34. CaseType Attributes.

This table describes configuration attributes for the types of cases whose status will change after application transfer has been undone.

Attribute Name	Type	Purpose
status	Code Table Entry	This attribute contains an entry from the case type code table.

5.13 Configuring the Application To Do List Context

The application To Do list displays the outstanding tasks that the worker must complete in order to finish processing the application. It is possible to configure the name of the context used to load the To Do list on the application homepage. To configure the To Do list context do the following:

- Open the XML document which represents the intake process configuration.
- Locate the XML element ApplicationType which represents the application type to be configured.
- Create or locate an XML element TODOListAdviceContextKeyName as a direct child of the ApplicationType element.
- On this element the following attribute can be specified which will configure the name of the TODO list context:

Table 35. TODOListAdviceContextKeyName Attributes.

This table describes configuration attributes for name of the application TODO list context.

Attribute Name	Type	Purpose
name	String	This attribute contains the name of the application To Do list context.

5.14 Configuring the Application Quick Search

The results of the quick search for applications are configurable for the intake process. To configure the application quick search results do the following:

- Open the XML document which represents the intake process configuration.
- Locate the XML element ApplicationType which represents the application type to be configured.
- Create or locate an XML element QuickSearch as a direct child of the ApplicationType element.

5.14.1 Configuring Application Quick Search Preview Panels

Preview panels for the applications in the results list can be configured as follows:

- For each preview panel you wish to configure on the search create an element PreviewPanel as a direct child of QuickSearch.
- On this element the following attributes can be specified which will configure the page to display in the quick search results preview panel:

Table 36. PreviewPanel Attributes.

This table describes configuration attributes for the application quick search preview panels.

Attribute Name	Type	Purpose
Page	String	This attribute contains the name of the client page that will be used for the preview panel.

5.14.1.1 Configuring the Application Statuses that Display the Preview Panel

The statuses of applications that the parent preview panel will be used for can be configured as follows:

- For each application status you wish the parent preview panel to be used for create an element ApplicationStatus as a direct child of PreviewPanel.
- On this element the following attribute can be specified which will configure the status of application that will use the parent preview panel:

Table 37. ApplicationStatus Attributes.

This table describes configuration attributes for the status of application that will use the parent preview panel.

Attribute Name	Status	Purpose
status	Code Table Entry	This attribute contains an entry from the application status code table.

Appendix. Common Intake Environment Variables

A.1 Application Properties

This appendix describes application properties for Common Intake. These may be administered through the Cúram system administration application - see the Cúram System Configuration Guide for more information.

Table 38. Common Intake Environment Variables.

This table contains Common Intake environment variables.

Property Name	Description	Default
curam.case.product.registrars	List of product registrars.	curam.citizen.datahub .holdingcase.holdingevidence .fact.HoldingEvidence RegistrarFactory,curam. sample.sl.fact.SampleSporting GrantEvidenceRegistrar Factory,curam.core.sl. infrastructure.fact.Participant EvidenceRegistrarFactory
curam.applicationsearch .applicationsearch	Whether intake applications should be included in the application banner search.	YES
curam.application .applicationtransfer	Whether the application transfer is enabled.	YES
curam.address.intakeprospect personregistrationdefault addressdatalocale	Sets the locale for the address data while registering a prospect person when creating an address for which no details are provided.	en_US
curam.intake.map.default .zoom.level	This property is used to configure the initial zoom level of the Google Maps display on the Service Provider screen. Zoom levels between 0 (the lowest zoom level, in which the entire world can be seen on one map) to 21+ (down to individual buildings) are possible.	11
curam.intake.map. default.center.latitude	This property is used to configure the default latitude of the center of the Google Maps display on the Service Provider screen.	-89.40570831298828
curam.intake.bom. milestoneconfiguration. updatestartdate.enable	When specified to true, this flag will ensure that start date of milestone configuration entity will be set to current date while transporting.	true

Table 38. Common Intake Environment Variables (continued).

This table contains Common Intake environment variables.

Property Name	Description	Default
curam.assignment.of.application.to.workqueue.enabled	Indicates whether or not an application can be assigned to a work queue. Very importantly this variable will be used in conjunction with the user's Intake Configuration, so if this variable is enabled and the user's allocation target type is a work queue, then the application will be routed to the work queue.	YES
curam.application.update.person.details.from.script.enabled	Indicates whether or not a person's participant details should be updated with information captured in the application script.	NO
curam.application.person.contact.details.set.to.primary.from.script.enabled	Indicates whether or not the contact details of a person captured via the application script should be set to the primary details of that type, e.g. phone number.	NO

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