IBM Cúram Social Program Management

IBM

Cúram Universal Access Guide

Version 6.0.5

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Chapter 1. Introduction

1.1 Purpose

The purpose of this guide is to provide an overview of IBM Cúram Universal Access (UA). After reading this guide, the reader should have a basic understanding of how UA can be used to allow a citizen to identify services and apply for programs that will meet their needs and how the citizen can use the online service for most of their interactions with the agency.

In order to best understand these concepts, the guide should be read in full. The guide is not intended to be used as a training or user guide.

1.2 Audience

This guide is intended for business analysts employed by your organization.

1.3 Prerequisites

To better understand the topics covered in this guide, it is suggested that the reader has previously read the `Cúram Integrated Case Management Guide`.

1.4 Chapters in this Guide

The following list describes the chapters within this guide:

IBM Cúram Universal Access Overview
> This chapter provides an overview of the need for citizens to be able to access services and programs online and how IBM Cúram Universal Access meets this need.

Determining the Best Course of Action for a Client
> This chapter describes how a citizen can use triage to quickly identify community services and government programs to meet their needs.

Screening a Client for Programs and Services
> This chapter describes the two types of screening which can be performed by a citizen: filtered and eligibility.

Completing and Submitting Client Applications
> This chapter describes the process of submitting and subsequently managing applications.

Citizen Account
> This chapter describes the citizen account creation process and provides an overview of the information available from the citizen account.

Securing IBM Cúram Universal Access
> This chapter describes how IBM Cúram Universal Access is secured using the three different types of user accounts: Generic Public Account, System Generated Account and Citizen Created Account.

Chapter 2. IBM Cúram Universal Access Overview

2.1 The Needs of Citizens: What is Required of the Agency

As web access becomes faster and more available, enterprises are offering innovative, customer-service solutions via the Internet. These solutions are often referred to as web self-service. They allow customers to access specific information and perform routine tasks without requiring any interaction with a representative of the enterprise.

Social Enterprise Management (SEM) agencies are particularly interested in these developments. Agencies face a unique challenge in communicating with, and providing many complex benefits and services to, a large number of citizens who have had no previous interaction with the agency. This can affect the relationship between the agency and the citizens who want to avail of their services.

2.2 Using Web Self-Service to Help Citizens

A web self-service solution can help to address these issues. However, most agencies will have demanding requirements for the citizen-facing applications that form the basis of such a solution. Given the diversity of the benefits and services that agencies offer – child care, income support, medical cover, and so on – it is important that the solution provided is fully configurable and has a consistent and clear navigation so that citizens can easily find, understand and apply for the services and benefits they need without requiring the help of an agency worker. Ideally, any configuration changes should not require modifications to the source code, as this can be a time consuming process.

IBM Cúram Universal Access (UA) meets these requirements by allowing citizens to interact with an agency over the Internet. UA is a fully-configurable, citizen-facing application that enables agencies to provide a user-friendly and intuitive web self-service solution.

2.3 How Does IBM Cúram Universal Access Meet This Need?

Using UA, citizens can perform key tasks without the intervention of an agency worker:

* **Triaging a Citizen to Determine their Needs**

  A citizen can answer a short set of questions to quickly identify services in their community as well as government programs which may meet their needs.

* **Screening a Citizen for Programs**

  A citizen can screen themselves, to determine their eligibility for the programs offered by the agency.

* **Facilitating Citizen Application Submissions**

  A citizen can apply for programs and track the status of any applications they have made.

* **Managing Client Applications and Life Events: The Citizen Account**

  A citizen can report a life event, such as the birth of a child, marriage, or a change in employment as these changes may effect the benefits or programs they are receiving. UA also provides a Citizen Account which provides citizens with a fast and convenient way to securely perform screening, applications and triage as well as providing access to payment information, scheduled activities, in progress and submitted applications and case worker contact information.

  The citizen is also provided with information representative of their particular circumstances in the form of messages and outreach. The messages displayed aim to predict why the citizen has logged in, for example, messages are displayed informing the citizen of their latest payment amount and their next payment date. Outreach allows for information, in the form of text, links and images, to be displayed which may help the citizen. For example, if a citizen has reported that she has just had a

baby, information on applying for a birth certificate or information on child care could be displayed. Additional information can be added to the citizen account if the agency deems it appropriate to share more information with the citizen.

Chapter 3. Determining the Best Course of Action for a Citizen

3.1 Introduction

Citizens who have little or no interaction with an agency may find it difficult to identify the services and programs they can avail of to meet their needs. UA provides a triage process which can be used to quickly identify a citizens needs and can direct them to community services and government programs. For example, a client may have an immediate need for food and shelter for his or her family. Triage will quickly identify these needs and provide details of suitable services, service providers and programs to help meet those needs.

A citizen can perform triage at any point in time but is normally used when a citizen has an emergency need and they are not familiar with the services and programs they can avail of i.e. It may be their first interaction with an agency. Citizens who have had previous interactions with an agency and are aware of how their needs can be met may screen or apply for programs.

This chapter outlines the features of triage in UA which allows citizens to quickly identify services and programs to meet their needs.

3.2 How does Triage Work?

UA provides infrastructure to allow an agency to configure a set of questions which can be presented to the citizen and aims to capture information about the citizen's situation. It is recommended that this question script contains a short set of questions so that the citizens basic needs can be quickly identified. Based on the answers provided to these questions, services and programs which may meet the citizens needs are displayed. Triage is initiated by selecting the Government and Community Help option on the UA Home page and choosing Find Community Help. The citizen is then presented with a set of questions.

3.2.1 Capturing Client Information via Triage Scripts

The information is captured using a question script defined by the agency. A system property is provided which specifies the script to display. The question script is created using Cúram Intelligent Evidence Gathering(IEG). With IEG, information is gathered interactively by displaying a script of questions that the citizen can provide answers to. A sample question script may ask questions about the client's basic needs - Food/Shelter, Finance, Physical Health/Disability and Mental Health/Substance Abuse.

When the citizen has provided answers to the questions in the script, clicking the Next button on the question script will display the results to the citizen.

3.2.2 Displaying Triage Results

Based on the answers the citizen provides, a list of community services and government programs are displayed to the citizen which may meet their needs. A textual alert may also be displayed highlighting important information to the citizen. These results are derived using a Cúram Eligibility Rule set (CER) which runs when the citizen has completed the question script. A system property is provided which dictates the rule set to execute for Triage. The results of the triage are displayed onscreen to the citizen. Available services are displayed on the left hand side. Providers of these services are displayed on Google Maps and are represented by icons. On the right hand side a list of applications and screenings are displayed. Alerts are displayed at the top of the page. 3.3, "Working with the Results of Triage," on page 6 outlines these features in more detail.

3.3 Working with the Results of Triage

Triage results provides a citizen with access to information on service providers and government programs and allows a citizen to easily identify the location of service providers, get directions to providers locations and to screen or apply online for government programs. This section describes triage results in more detail.

3.3.1 Mapping Provider Locations

When the results page opens initially a number of services may be preselected and the locations of the providers of the preselected services are displayed on the map. Preselecting a number of services will prevent potentially hundreds of providers being displayed on the map which may confuse the citizen. A system property is provided to dictate the number of services which are preselected, for example, if the preconfigured number is set to 10 and more than 10 services are returned, then the first 10 services are preselected; if the preconfigured number is set to 10 and 10 services or less are returned then all the services are preselected. Note: The user is not prevented from selecting more than 10 services.

In order for the map to display providers specific to an agency's and a citizen's location, a number of configuration settings are provided which dictate the area of the map to display initially, for example, a configuration setting is provided which will allow an agency to define a central point which means that the map will open at this central point.

A zoom level can also be configured which dictates the zoom level of the map when the results page is initially displayed. Setting the zoom level is important as it dictates whether the icons representing the providers are visible or not - setting it too high will show a very large area, a state for example, means that the icons representing providers are not displayed. A citizen will not be able to identify service providers unless they manually zoom in. Setting the zoom level at a low level will mean that only a small number of providers are visible making it difficult for a citizen to see all providers close to them.

The citizen is also provided with the ability to search for providers in a particular area, for example, if the citizen specifies 'Springfield' all providers of the services listed in the Springfield area will be displayed on the map. The search is supported by a configuration setting known as the geocoding bias which dictates the north/south/east/west boundaries of the map to display when a citizen searches for a location. This is useful when a citizen searches for a location which may exist in multiple locations on the map i.e. there are a number of towns called 'Springfield'. The geocoding bias dictates which 'Springfield' to display. Additionally, providers whose addresses are located outside of the boundary defined by the bias are not displayed on the map.

The following table outlines how the map reacts to various actions performed by a citizen:

Table 1. User interactions with the map

Citizen Action	Map Reaction
Citizen specifies a location that cannot be found	The map does not change but a message is displayed to the citizen indicating that their location cannot be found.
Citizen specifies a location that can be found	Icons for service providers are displayed as long as the location entered brings the map to a zoom level which allows provider icons to be visible.
Citizen specifies a location that exists multiple times	The map does not change but a message is displayed to the citizen indicating that they need to refine their search by specifying the state or zip code.
Citizen zooms out	If the citizen zooms out past the zoom level at which icons can be displayed, the icons will disappear. A message will be displayed to indicate that they need to zoom in to see the service providers.

Table 1. User interactions with the map (continued)

Citizen Action	Map Reaction
Citizen drags the map to the left and right, up and down.	Additional service providers are displayed if appropriate.

For more information on triage configuration settings, see the `Cúram Universal Access Configuration Guide.`

3.3.1.1 Viewing Provider Details

To allow a citizen to choose a provider which best suits their need, additional provider information is provided. This information is accessed by selecting the appropriate icon on the map. Provider details are displayed to a citizen i.e. Contact information, a map showing the providers location, and information which may be relevant to the citizen, for example, the documents a citizen may need to bring to a provider to receive a service.

The following table describes each of these areas:

Table 2. Provider Details

Information	Description
Service Information	The name and description of the service.
Contact Information	The providers name, address, phone number, email address and website are displayed. Important client information is also shown here, for example, opening hours. This is recorded as Client Information in Cúram Provider Management (CPM).
Other Services	Additional services that the provider provides are listed.
Specialties	Provider specialties are areas of provider expertise or experience, for example, they may be Spanish speaking or they may work with disabled citizens.
Intake Procedure	Providers may have a specific intake procedure, for example, the client may have to go into the providers office to apply rather than applying online.
Eligibility	In order to receive a particular service from the selected provider, there may be eligibility criteria, for example, the client may need to be over 18.
Accreditations	An accreditation is a certification of competency provided by third parties which states that the provider is meeting their formal standards required to deliver a service. For example, the National Association of Child Care Professionals is a third party which gives accreditation to child care providers for their early care programs.
Fees	The amount of money a citizen may have to pay to receive the service.
Areas Served	The provider may only serve particular areas within a city/region.
Documents Needed	The citizen may need to bring documentation in order to receive a service from a provider, for example, a birth certificate or drivers licence.

For information on configuring provider details see the `Cúram Provider Management Business Guide.`

The provider details page also allows a citizen to print the providers details, get directions to the providers location and also to contact the provider using the Refer Me link.

3.3.1.2 Getting Directions

To view and print directions from a citizen specified location to the providers locations, the Get Directions link can be selected. A citizen can specify their starting location and can also choose the mode of transport that they will be using. Based on their selection, walking or driving directions will be provided. The unit of distance can also be specified i.e. Miles or kilometers. A citizen can print these directions inclusive of the map.

3.3.1.3 Referring a Citizen to a Provider

The citizen may wish to contact the provider to inform the provider that they are interested in the service and may want to avail of it. To do this, the Refer Me link can be selected which allows the user to specify their contact details and to write a message which will be sent by email to the provider. A configuration setting is provided in CPM to dictate if a provider allows for this type of referral to be sent to them.

For information on configuring provider details see the `Cúram Provider Management Business Guide`.

3.3.2 Displaying Alerts

Based on the answers provided by a citizen it may be necessary to alert them to important information, for example, if a citizen has answered a question which indicates that they are in danger of physical abuse the contact number for emergency services may be displayed. To cater for this, alerts can de defined in the triage rule set and subsequently displayed on the triage results page. Multiple alert messages can be displayed on this page if necessary.

3.3.3 Screening or Applying for Programs from Triage

As well as providing a citizen with details of community services that meet their needs, government programs are also provided. From the triage results page, a citizen can screen for and/or apply for a number of government programs that may meet their needs. Depending on the answers provided by the citizen in the question script, the CER rule set will identify and display one or more screenings and applications which will enable a citizen to identify if they are eligible and subsequently apply for one or more government programs. Applications and screenings may contain multiple programs within them. The CER rule set can also identify specific programs within the screenings and applications which may meet the clients needs i.e. When a screening or application is selected from the triage results page, some or all of the programs within the screening and application can be preselected.

For more information on screening and applications see Chapter 4 and Chapter 5 of this guide.

Chapter 4. Screening a Client for Programs and Services

4.1 Introduction

Screening for eligibility allows a citizen to determine if they are potentially eligible for one or more programs based on a short set of guided questions and a short set of eligibility rules. Based on this determination, the client can decide whether to apply for the programs identified.

This chapter describes the features of screening in more detail.

4.2 Screening Types

Two types of screening are supported by UA – filtered screening and eligibility screening. Filtered screening is used to reduce the number of programs for which a citizen may want to screen. For example, a particular type of screening may screen for 50 programs. However, there are some basic questions (e.g., are you married, are you pregnant), gathered using an IEG script, that can be used to quickly identify programs for which a citizen is unlikely to be eligible.

Eligibility screening typically involves collecting answers to several more detailed questions (using an IEG script), so the set of guided questions is longer. Typical questions defined in the script relate to a person's resources (savings, stocks, bonds, and so on) or household circumstances. By performing filtered screening first, a citizen can avoid answering such questions. That is, they can be informed of the programs for which completing full eligibility screening is likely to be most beneficial.

The results of filtered and eligibility screening – the programs for which a citizen might be eligible – are generated by running screening rules against the answers to the various questions. The citizen is then presented with the option of submitting an application for these programs. However, they can submit an application directly, without having to undertake screening first.

UA supports both anonymous and authenticated screening. Authenticated citizens (citizens who have created an account) may choose to save a particular screening session. This screening may be resumed at a later time.

4.3 Screening Selection

The screening process is initiated when the citizen selects Find Government and Community Help on the UA home page and choosing Check If You are Eligible for Government Benefits. The agency can configure the system to specify whether, before screening, the citizen can choose to be authenticated or not. If authentication is enabled, it means that the citizen may choose to be authenticated before proceeding with screening. If authentication is disabled the citizen will be taken through the screening process without being asked to log in or create an account.

Choosing to create a new account will bring the citizen to an account creation screen. Upon successful creation of the account, the citizen is automatically logged in to the system and the screening process proceeds.

If the citizen elects to log in, upon successful log in, the system will check if the citizen has an existing saved screening. If the citizen has a saved screening a page is displayed listing the screening that the citizen previously saved. The citizen can choose to start a new screening or resume the saved screening.

In order to continue with the screening process a screening must be selected. Depending on how the system is configured, the citizen can manually select the screening or the system will automatically select

the screening. The system will automatically select the screening if only a single screening has been defined. However, if more than one screening has been defined, the citizen must select the screening that they wish to undertake.

This screen lists and describes each of the screenings that are available on the system. UA allows screenings to be grouped together into categories, e.g. Health & Human Services, Unemployment Services etc. Screenings are presented to the citizen in these categories in order to make it easier to find the required item. The screenings, and their categorization, are defined in the UA administration.

An individual screening may allow a citizen to screen for one or more programs. Typically a citizen will be asked to select the programs for which they would like to be screened. However, there are three situations when the citizen will not be asked to select programs:

- If filtered screening has been defined for the screening. The citizen will however be asked to choose the programs they would like to be screened for once filtered screening has been completed.
- If a single program has been defined for the screening.
- If a screening has been configured not to allow program selection by a citizen.

Once the citizen has selected the screening and the programs for which they would like to be screened. The system invokes the associated IEG script allowing the citizen to start the selected screening.

For more information on configuring screening see the `Cúram Universal Access Configuration Guide`.

4.4 Determining the Most Suitable Programs for a Client

Filtered screening can be used to identify the most suitable programs for which a citizen may want to screen. By using filtered screening prior to eligibility screening, the citizen can be informed of the programs for which completing full eligibility screening is likely to be most beneficial.

Filtered screening is defined for a screening by specifying a filter script and rules. Typically a script for filtered screening should not be more than one or two pages in length. The objective is to enable the citizen to quickly determine the programs for which proceeding with eligibility screening is likely to prove most beneficial. If filtered screening has been defined, the citizen is brought immediately to the filtered screening script upon selection of the screening. The citizen is not asked to select programs. The rules are therefore executed for all programs defined in the filtered screening rule set.

The screening results page lists the programs that the citizen may be entitled to receive and those for which eligibility could not be determined. The latter list represents the programs that the citizen will not be eligible to receive, however the citizen is not prevented from proceeding with an application for these programs. The citizen can choose the programs for which they would like to proceed with eligibility screening from either list. Only programs that have been explicitly added to the screening in UA administration may be selected.

4.5 Screening for Potential Client Eligibility

Eligibility screening is used to determine a citizen's potential eligibility to receive a particular program or programs. It consists of a script to collect data and an eligibility screening rule set to determine the citizen's potential eligibility for one or more programs.

The eligibility screening rules are executed upon completion of the screening script and the results are displayed on the Am I Eligible page.

The eligibility screening rules are only executed for programs associated with the screening.

The eligibility screening results page is divided into two lists; programs for which the citizen may be eligible and programs for which eligibility could not be determined. The CER rules can be designed to provide detailed explanatory text to help the citizen understand the decisions regarding potential eligibility.

The text displayed in the Am I Eligible page header may be configured for each different type of screening to present a message that is relevant to the screening that has been undertaken by the citizen.

Clicking on the Next button opens the Your Next Step page. This page is divided into three sections; programs that can be applied for online, programs that can be applied for by opening and printing an application form, and programs that can be applied for by calling into a local office. The header text of the Your Next Step page can also be configured for a screening.

4.5.1 Applying Online for a Program

The Apply Online section lists all of the programs, for which the client elected to be screened, that can be applied for online from UA. The section is not displayed if there are no programs that can be applied for online.

An icon to the left of the program name indicates if the screening has determined that the citizen may be potentially eligible to receive the program. The text describing each program can be configured in UA administration. The text describing the other programs that may be applied for using the same online application is only displayed if there are other programs that can be applied for. Clicking on the Apply Online link opens the Select Programs page if there are other programs that the citizen can apply for using the same online application. The program for which the Apply Online link was selected is automatically selected and an icon is drawn next to the name of any programs for which screening determined potential eligibility. Clicking on the Next button opens the appropriate intake script.

4.5.2 Applying for a Program via Mail

The Print & Mail section lists each of the programs for which a PDF application form may be opened and mailed to the agency. This section is not displayed if PDF application forms have not been defined in UA administration for any of the programs affected.

Clicking on the application name or PDF icon opens the application form. Data entered during screening may be copied to the application form if a mapping configuration has been defined for the program. The text describing each program is defined in UA administration. The text describing the other programs that may be applied for using the same PDF application is only displayed if there are other programs that can be applied for. The Where will I mail this to? Link opens a dialog that enables the citizen to find the address of the appropriate office to which the application should be sent. Please see 5.7, "Printing an Application," on page 17 for more information.

4.5.3 Applying for a Program in Person

The Local Office section lists all of the programs that can be applied for by visiting a local office. This section is not displayed if no programs can be applied for in this manner.

The Where is my local office? link opens the window that enables a citizen to find the address of the local office that handles applications for a particular program. This is the same functionality as that available for PDF application forms. However, in this case, the relationship between a service area and a location must be defined for the program.

For information on configuring screenings see the Cúram Universal Access Configuration Guide.

Chapter 5. Completing and Submitting Client Applications

5.1 Introduction

In order to apply for programs, a client must submit an application, providing required information on personal details, income, expenses, employment, education etc. This information becomes evidence on the client's case and is used to determine eligibility.

An application for a particular program can be configured to be undertaken in UA using one or all of the following methods:

- Completion of an online application (in the form of an IEG script)
- Using an editable PDF application form
- Citizens may also be given the traditional option of calling to a local office of the agency, the address of which is displayed in UA

UA enables citizens to apply online for one or more programs by completing an online application. The online application is defined using an IEG script that guides the citizen through a series of steps that collect the appropriate information for the programs for which the citizen is applying. Both authenticated and anonymous online application is supported and configurable. Authenticated citizens may choose to exit and save an application for completion at a later time. The application is then resumed at the point last completed by the citizen. Once submitted, a citizen can log into UA to check the status of an application. The citizen can choose to withdraw the application if for any reason they do not want to proceed. The citizen may also review the information that was entered on the application. A PDF document can be generated by the citizen that contains all of the information entered by the citizen on the application. This can then be brought or posted to the agency and also acts as a copy for the citizen's records of the information that was entered on the application.

This chapter describes the features of application intake in more detail.

5.2 Starting the Application Process

The application process is initiated when the citizen selects Find Government and Community Help from the UA home page and chooses Apply For Benefits. The agency can configure the system to specify whether, before making an application for benefits, the citizen must be authenticated or not. If authentication is enabled, the citizen must be authenticated before proceeding with application intake. If it is disabled, the citizen may proceed with intake without authentication. If the citizen must be authenticated, the citizen must either create a new user account or log into an existing account before commencing the intake process.

At this point in the process, the citizen has a maximum of three (depending on the authentication configuration) choices that can be made:

- Create a new account
- Log in to an existing account
- Proceed without authentication

Choosing to create a new account will bring the citizen to an account creation screen (for more information please refer to the Chapter 6 Security). Upon successful creation of the account, the citizen is automatically logged in to the system and the intake process proceeds.

If the citizen elects to log in, upon successful log in, the system will check if the citizen has any existing applications either in progress (i.e. not yet submitted to the agency) or awaiting disposition (i.e.

Submitted to the agency but the agency has not yet processed the application). The lists are only displayed if there are items in the list, i.e. If there are no saved applications, the section containing saved applications is not displayed.

If applications are listed, the citizen is presented with several options depending on the state of a particular application. The citizen may choose to resume or delete an incomplete application, withdraw an application that has been submitted or start a new application. For the purposes of this chapter let us assume that the citizen chooses to start a new application.

5.3 Starting and Selecting an Application

An application can be started by selecting the Start New Application link on the Current Applications page which is opened if the citizen has chosen to login. If the citizen has created an account and automatically logged in or has chosen not to be authenticated the citizen is brought automatically to the application selection page. In order to continue with the intake process an online application must be selected. Depending on how the system is configured, the citizen can manually select the application or the system will automatically select the application. The system will automatically select the online application if only a single application has been defined. However, if more than one online application has been defined for the system, the citizen must select the online application that they wish to complete.

The select applications page lists and describes each of the online applications that are available in the system. UA allows applications to be grouped together into categories, e.g. Health & Human Services, Unemployment Services etc. Applications are presented to the citizen in these categories in order to make it easier to find the required item. The applications, and their categorization, are defined in the UA Administration section of the Cúram Administration Application.

An application may allow a citizen to apply for one or more programs. Typically a citizen will be asked to select the programs for which they would like to apply. However, there are two situations under which the citizen will not be asked to select programs:

- A single program only has been defined for the application.
- Each application can be configured to allow program selection by the citizen or to automatically select all of the programs associated with the application.

The select programs page is displayed if the system has been configured to permit the citizen to select the programs to apply for. This page displays a list of the programs that have been associated with the application. The citizen can select any combination of the programs. For each program, the program name (a link if a URL has been defined for the program) and summary are displayed. The content of this page are defined using UA Administration.

At this stage, the citizen has selected the application and the programs for which they would like to apply. The system invokes the associated IEG script allowing the citizen to start completing the selected online application.

5.4 Saving an Application

When quitting an application, the citizen is given one of four choices depending upon how the intake application has been configured. The citizen can:

- Save the application.
- Send the application to the agency for processing.
- Print the application.
- Exit without saving the application.

This section describes the processing that is undertaken if the citizen opts to save the application.

If the citizen opts to save the application, the save application screen (which allows the client to create an account or to log in) is displayed if the citizen has not already logged in to the system. This screen is skipped if the citizen has logged in already.

The citizen can choose to create a new account or log in to the system. If the citizen logs in to an existing account, the system checks if the citizen has an in progress (i.e. not submitted to the agency) application of the same type. If the citizen already has an application of the same type, a page is displayed giving the citizen the option to keep the existing application and discard the new application, or to delete the existing application and save the new application.

If, as a result of decisions made by either the citizen or the system, the new application is saved, a page is displayed confirming that the application was successfully saved.

On the initial pass through a script, the information entered by the citizen is not saved until the citizen exits the script and chooses to save the application.

5.5 Resuming an Application

An application can be resumed by selecting the Continue with Application link on the Current Applications page which resumes the application from the point at which it was last saved. When an application is resumed, the data entered is automatically saved as the citizen moves from page to page through the script. As the data has already been saved, the option to save the script is not presented to the citizen upon exiting the script. The options presented to the citizen depends upon the script configuration.

5.6 Submitting an Application

An application may be submitted or sent to the agency upon completion of the intake script or optionally upon exiting a script before it has been completed. An intake application can be configured such than an agency can dictate whether an application script can be submitted before it has been completed or not.

If the citizen chooses to send an application to the agency (by exiting or completing a script), the screen displayed depends upon whether the citizen is already logged in and a property which dictates whether a citizen must either create or login to an account before submitting the application. If the citizen has already logged in, UA does not prompt the citizen to log in or create an account. However, if the citizen is not logged in, UA will encourage the citizen to either log in or create a new account. If the property is enabled, the citizen must log in to an existing account or create a new account before the application can be sent to the agency.

If the citizen does not need to identify themselves to the system, and is allowed to send the application to the agency without logging in or creating an account, then an option can be configured to allow the client to do so. This option will not be configured if the citizen is required to create an account or login to an existing account.

If the citizen has logged in to an existing account before sending the application to the agency, the system can determine if the citizen already has an in progress application of the same type or has previously submitted applications for the same programs that are still pending disposition (awaiting a decision by the agency). In the case of the former, then a page is displayed presenting the citizen with the opportunity to send the new application to the agency or alternatively to keep the saved application, thus discarding the new application.

If the citizen has previously submitted applications for the same programs, the system determines if the citizen can still submit any of the programs to the agency for processing. Programs can be configured to allow multiple applications to be submitted for the program at any one given time, e.g. a citizen may want to submit a new application for cash assistance for a different household unit than a previous application that they may have submitted that is still being processed by the agency.

This screen alerts the citizen to the fact that whilst application may still be sent to the agency, it cannot be submitted for all of the programs for which the citizen wants to apply. The citizen has three options; continue to submit the application for the programs which the citizen is allowed to apply, save or delete the application.

In order to submit an application to the agency, a submission script must be specified for the application in UA administration. This is required because applications require additional information, which does not form part of the application, to be captured before they can be submitted. For example, a TANF application typically requires information regarding the citizen's ability to attend an interview. This information would not be appropriate for another type of application that does not require an interview to be conducted, e.g. Unemployment Insurance. Electronic signatures are another example of the type of information that would typically be captured using a submission script. This data may not be captured as part of the script, as potentially the citizen can submit before completing the script.

The processing that is undertaken upon completion of the submission script depends upon the configuration of the programs for which the citizen is applying. Program eligibility can be configured such that it may be determined using a Cúram system or a remote system. If Cúram is specified as the eligibility system, an application case creation process is invoked. The application case creation process includes a search and match capability which attempts to match clients on a new application to registered persons on the system based on configured search criteria. Once search and match has been completed, one or more application cases are created - multiple application cases are created if the programs being applied for are configured for different application case types. The application date on the application case(s) is set to today's date if the application was submitted within the business hours of the root location for the organization. If the application is submitted outside of the business hours of the organization, the application date is set to the next business date.

The data entered for the application may be mapped to case evidence tables. The mappings are configured for a particular program using the Cúram Data Mapping Editor. A mapping configuration must be specified for a program in order for the appropriate evidence entities to be created and populated in response to an online application submission. For more information on defining mappings for a program see the `Cúram Data Mapping Editor Guide`.

When the application case has been created, the programs requested by the client are associated with the relevant application case. Some organizations may impose time limits within which an application for a program must be processed - a number of timer configuration options are available for a particular program. These timers are set when a program is associated with an application case. For more information on application case processing see the `Cúram Intake Guide`.

If the eligibility is being determined by a remote system, configurations are provided to allow a web service to be invoked on a remote(non-Cúram) system. For more information on configuring remote systems see the `Cúram Universal Access Configuration Guide`.

The submission confirmation page is displayed upon successful submission of an application to the agency. This page informs the citizen of the reference number associated with the submitted application. Citizens can use this reference number in any further correspondence with the agency with regard to the application.

The citizen may also open and print a PDF. The actual PDF that is opened depends upon the configuration of the intake application. The application can be configured to use a PDF designed specifically by the agency to be used in conjunction with the intake application, or if no PDF form has been specified a generated generic PDF can be used. If an agency designed form is specified, this form is opened when the citizen clicks the PDF link. The data entered during the online application will be copied to the PDF form for each of the programs, for which the citizen is applying, that have associated mapping configurations of type PDF Form Creation. If a mapping configuration has not been associated with a program, the information entered during the online application for that program will not be copied to the PDF form. If a PDF form is not specified, a generic generated form is opened instead. This

form contains a copy of the information entered by the citizen whilst completing the online application. For more information on the configuration of the generated form, see Appendix C of the `Cúram Universal Access Configuration Guide`.

The agency can define additional information to be displayed on this page. This is typically information that may be required by the citizen in order to help the agency process the application in a timely and effective manner for both the agency and citizen, for example, proof of identity. This information is configurable for each type of application.

5.7 Printing an Application

UA supports two methods by which a citizen can open and print an application form; the citizen may be directed to a PDF that can be opened, printed and subsequently filled out by the citizen, or the citizen may be taken through a script, which upon completion or exit, the citizen can open a PDF containing the information entered via the script.

PDF forms can be configured such that versions of all languages can be provided. The programs which can be applied for using the PDF form can also be configured.

For information on configuring PDF forms see the `Cúram Universal Access Configuration Guide`.

Each PDF form defined in UA administration is displayed on the Apply for Benefits page which is displayed when Apply For Benefit is selected from the UA Home page.

Clicking on the form name or PDF icon opens the PDF form. The citizen can also find out where to mail the form by clicking on the link in the Where To Apply? column. This link opens a dialog that allows the citizen to enter the zip code or county, of the area within which they reside, to find out the address of the local office to which the form should be mailed. A system property is provided which is used to dictate whether zip codes or counties are used for this function.

UA administration allows an agency to define service areas. A service area represents a region covered by the counties and/or zip codes that have been associated with the service area. A service area can be associated with a particular local office for a PDF form, i.e. If you reside in this area, send your application form to the office at this address. A default local office can also be defined for a PDF form. The address of this office is returned to the citizen if the system can not find a local office that has been configured to cover the area in which the citizen resides. In addition, if a working pattern of type Public Opening Hours has been defined for the local office (Cúram location); information on the office opening hours is displayed to the citizen.

A PDF application form may also be opened from an intake script. The script is used to collect the appropriate data. Upon completion of the script (or exit from the script) the citizen is presented with the opportunity to open a PDF form containing the data entered via the script. This is achieved by associating a PDF form with an intake application in UA administration.

The Open my application form link opens the custom PDF form that has been designed specifically for the intake application. The data entered during the online application is copied to the PDF form for each of the programs, for which the citizen is applying. Note: If mapping configurations have not been associated with a particular program, they will not be displayed in the PDF).

If a PDF form and submission script are associated with an intake application, upon completion of the script, the citizen will be asked to send the application to the agency. The option to print the application form will not be presented to the citizen until the submission confirmation page is displayed.

5.8 Withdrawing an Application

Upon successful submission of an application, a citizen may withdraw the application for all or any one of the programs for which the citizen has applied. An application may be withdrawn by selecting the Withdraw link on the Current Applications page. Applications can also be withdrawn from the Applications page in the Citizen Account. See Chapter 6 Citizen Account of this guide for more information.

Each program may be withdrawn individually. Clicking on the Withdraw link opens the Withdraw Application page. The program associated with the link, i.e. on the same row, is automatically selected. The reasons for withdrawing the program application can be configured for the intake application in UA administration.

5.9 Deleting an Application

Saved online applications may be deleted. The delete option is available from the Current Applications page. Applications which have not yet been submitted to the agency can be deleted. Applications can also be deleted from the Applications page in the Citizen Account. *See Chapter 6 Citizen Account of this guide for more information.* Clicking on the Delete link opens a confirmation page.

Chapter 6. Citizen Account

6.1 Introduction

The Citizen Account is a facility within UA which provides a citizen with a fast and convenient way to securely apply for programs and to perform triage and screening. It also provides access to the following features:

Home Page
> The citizen account home page is the first page displayed to the citizen when they log into their account. It provides access to messages which have been defined by agencies which aim to provide useful information to the citizen, such as the next payment date, last payments and upcoming meetings. An outreach is provided which allows for targeted campaigns to be displayed to the citizen based on the citizens circumstances.

My Applications
> Applications which a citizen has submitted or are currently in progress can be accessed. A new application can also be initiated.

My Screenings
> In progress screenings are displayed and can be resumed by the citizen.

My Payments
> The citizen is provided with a history of all payments made to date by the agency.

My Activities
> Services, referrals and actions which are scheduled for the citizen are available to the citizen.

Contact Information
> A citizen is provided with the contact information the agency has on the system for the citizen i.e. Address, email and phone number. Additionally, the contact information of all caseworkers associated with the citizens cases can be displayed.

Life Events(My Updates and My Information)
> The citizen is provided with information on how to deal with significant changes in their life as well as report these changes to agencies. A list of previously submitted changes is also provided.

This chapter describes these key features in more detail.

6.2 Creating an Account and Logging In

As described earlier in this guide a citizen can create a UA account during the screening and application process. In order to provide the citizen with access to all of the information available in the citizen account, the citizen must be firstly registered as a participant on the system of record e.g. Cúram. This record must then be linked to their UA account. Agencies may have various security processes to validate that a citizen account user is the same person that is registered on the system and as such an API is provided which agencies can use to link their citizens. Once an agency has linked a citizen, the citizen can login and has full access to their account.

A standard account is also provided for users who have not yet been linked to a Cúram account. Using the user name and password created during the screening and application process, the citizen can login and access applications and in progress screenings.

6.2.1 Logging In

To login to the citizen account the citizen selects to Login on the IBM Cúram Universal Access home page. The citizen is asked to specify a user name and password and then selects the Next button.

The next page displayed when the user selects the Login button depends on whether the citizen is linked to a participant in Cúram and whether second level authentication is enabled in UA administration. Second level authentication means that the citizen will be asked to provide additional personal information before they are fully logged in, for example, date of birth, social security number(SSN). UA allows an administrator to define one or more pieces of data that the citizen must provide. If second level authentication has not been defined the citizen is brought to the Citizen Account home page. If second level authentication has been defined and an administrator has specified that date of birth and SSN must be specified by a citizen before they can login, then a page will be displayed prompting the citizen to enter their date of birth and SSN.

If the citizen is not linked to a participant in Cúram, second level authentication is not applicable and the citizen is brought to the account home page if the user name and password passes authentication.

A forgotten password and rest password capability is also provided. If a citizen has forgotten the password, a new password can be requested. If the citizen has an email address recorded on the system, an email is sent with a new password. If the citizen does not have an email address, the secret/question answer can be used to reset the password. A citizen can also reset their password once they have successfully logged into the citizen account.

For more information on configuring second level authentication, see the `Cúram Universal Access Configuration Guide`.

6.3 Citizen Account Home Page

When the citizen has successfully logged in, the citizen account home page is opened. The citizen account home page contains two main sections: Messages and Outreach.

6.3.1 Messages

The My Messages section of the home page displays messages which aim to predict why the citizen has logged in, for example, a message can be displayed which informs a citizen of when their next benefit payment is due or a message can be displayed which informs a citizen what their last payment amount was. Messages can be displayed which relate to meetings a citizen has been invited to, activities which have been scheduled for a client, applications acknowledgements and so on. Messages from remote systems can also be displayed by using web services to transmit the messages. This section describes the characteristics of these messages.

6.3.1.1 Displaying a message
Each message has a title, an icon and an effective date and time which dictates when it gets displayed. In the majority of cases, the effective date of a message is set to the current date but in some circumstances configuration settings are provided which dictate the effective date. For example, when a payment is issued by the system, a message is generated and the effective date is set to the current date since the message is valid from today and should be displayed to the citizen. However, when a service is scheduled for a citizen, it may not be appropriate to display the message immediately if the service has been scheduled for two months in the future. In this case a configuration setting is provided to dictate the number of days before the start date of the service that the message should appear in the citizen account i.e. This date will be used to populate the effective date. Messages from remote systems are displayed based on the effective date specified in the web service.

6.3.1.2 Prioritization and Ordering
A priority can also be assigned to a message such that it is displayed at the top of the Messages listing. An ordering of messages types can also be configured in UA administration, for example, payment messages can be displayed first, meeting messages can be displayed second.

6.3.1.3 Duration of message
The length of time that the message is displayed depends on the type of message. Some messages relate to items which have start and end dates which can be used to dictate how long the message is displayed

for. For example, service messages are displayed until the start date of the service are in the past. In other cases, it may be appropriate for a message to be replaced by another message, for example, a message which informs a citizen of their last payment can be displayed until their next payment is made which will result in a new message to replace the old one. In this case, a configuration setting is also provided which will allow the agency to decide if they want to replace messages in this way or whether they want to define a number of days after which the message is removed. The duration of messages from remote systems are based on the expiry date defined in the web service.

6.3.1.4 System Messages

System Messages can also be displayed. System messages can be used when an agency wants to send a message to all citizens who have a citizen account. For example, if an agency wants to alert all users that the system is going to be down on a particular day. System messages can be configured in UA administration. An effective date can be defined for a system message which dictates when the message will appear in the citizen account. An expiry date can also be specified which dictates when the system message will be removed from the citizen account.

6.3.1.5 Predictive Response Manager

The Predictive Response Manager (PRM) is the infrastructure which is used to build and subsequently generate and display messages on the citizen account home page.

For more information on configuring system messages and ordering messages by type see the `Cúram Universal Access Configuration Guide`.

A number of messages are provided out of the box. These are listed in Appendix A of this guide along with their associated configurations.

6.3.2 Outreach

Outreach campaigns allow agencies to define targeted campaigns which can be displayed in the citizen account. The campaigns are based on information that the agency knows about the citizen. For example, if the citizen is unemployed and has a child of school going age, information on child care can be displayed which will assist the citizen when they find work. The right hand panel of the citizen account home page is used to display outreach campaigns. This panel can display images, images and text, text with embedded links and images which can be links. Rich text is also supported.

Outreach campaigns can be configured in UA administration. Each campaign has an associated CER rule set which is used to dictate if a campaign should be displayed to a citizen or not. An expiry date can also be specified which dictates the duration of the campaign. A configuration setting is also provided which dictates the name of the campaigns panel displayed to a citizen on the citizen account home page.

For more information on configuring campaigns see the `Cúram Universal Access Configuration Guide`.

6.4 My Payments

The My Payments tab lists all payments that have been issued to a citizen. These messages can be retrieved from Cúram or any remote system. Payments which have been cancelled or expired are also displayed.

A payment can be made by check, EFT, cash or voucher.

Different details are displayed to the user depending on the payment type. The following details are displayed for each of the following payment methods:

- **Check**- Address and Check Number
- **EFT**- Bank Sort Code and Bank Account Number
- **Cash** - Address
- **Voucher** - Address, Voucher Number

For more information on payments see the Cúram Integrated Case Management Guide.

6.5 My Activities

The My Activities tab displays all activities that are scheduled for the client. Displaying activities will help ensure that a citizen attends all scheduled activities. Activities include actions, services and referrals which have been scheduled for a client in Cúram. Services, referrals and actions are normally scheduled for a client in an outcome plan which aims to help a client achieve a particular goal, for example, self sufficiency.

6.5.1 Services

Services which have a status of Not Started and In Progress are displayed. The service name, period, units remaining, a link to the provider details, required participation and a link to the contact details of the owner of the service are displayed. A link is also provided which allows a citizen to submit comments about the service. These comments can then be viewed on the service in the application by a case worker.

6.5.2 Referrals

Referrals which have a status of active and a referral date of today or in the future are displayed. The name of the referral and a link to the provider details is provided. When a referral is created for a client in the application, a referral letter is sent to the client. This letter can be accessed from the My Activities list also. A link is also provided which allows a citizen to submit comments about the referral. These comments can then be viewed on the referral in the application by a case worker.

6.5.3 Actions

Actions for which the client is responsible and have a status of Not Started or In Progress are displayed. The action name, period, participation and a link to the contact details of the owner of the action are displayed. A link is also provided which allows a citizen to submit comments about the action. These comments can then be viewed on the action in the application by a case worker.

For more information on services, actions and referrals see the Cúram Outcome Management Business Guide.

6.6 My Applications

The My Applications tab lists existing applications that are either in progress (not yet submitted to the agency) or awaiting disposition (submitted to the agency but the agency has not reached a decision yet). This is the same page as the Current Applications pages described earlier in 5.2, "Starting the Application Process," on page 13. The only difference is that accessing this page from the citizen account means that the citizen has been authenticated by the agency as described in 6.2, "Creating an Account and Logging In," on page 19 and now has access to other information within the citizen account as well as application information. The citizen is presented with several options depending on the state of a particular application. The citizen may choose to resume or delete an incomplete application, withdraw an application that has been submitted or start a new application. Starting a new application from the citizen account follows the same process as described earlier - the system will pre-populate the IEG script with information stored in a citizens evidence. This prevents a citizen from having to re-enter information that the agency already knows about them. A system property is provided which dictates if the IEG script is pre-populated.

6.7 Contact Information

The contact information tab provides a citizen with contact information of case workers who are dealing with their cases.

Information can be retrieved from the Cúram system or any remote system which interacts with UA.

6.7.1 Case Worker Contact Information

Contact information for the case worker of each case the citizen is associated with is displayed. Case worker contact information from Cúram and remote systems can be displayed. The case workers name, business phone number, mobile phone number, pager, fax and email can be displayed. A number of configuration settings exist which dictate what gets displayed on this page, for example, an agency can configure not to display case worker contact information. A configuration setting is also provided which dictates which contact information is displayed, for example, an agency may only want to display a case workers business phone number and email address.

For more information on configuring case worker contact information see the `Cúram Universal Access Configuration Guide`.

6.8 Running Triage while logged into the Citizen Account

As mentioned earlier, triage is the process of quickly identifying a client's needs to direct them to community services and government programs. A citizen can choose to run triage while logged into the citizen account. Triage can be initiated by selecting Find Government and Community Help and choosing Find Community Help. The triage question script is displayed and the citizen must answer the questions before being brought to the triage results page.

As with triage which has been run while not logged in, the system displays applications and screenings that may meet the clients needs. However, when running triage while logged in, the system will not display applications or screenings for programs which the citizen is already receiving or for which the citizen has a pending application.

When a citizen does choose to screen or apply while logged in, the screening and application scripts can be pre-populated based on information already known by the agency. A configuration setting is provided which will allow an agency to decide if screenings and applications scripts are pre-populated or not. Selecting to screen or to apply will bring the citizen to the Screening and Application process respectively.

6.9 Screening from the Citizen Account

Screening for eligibility allows a citizen to determine if they are potentially eligible for one or more programs based on a short set of guided questions and a short set of eligibility rules. Based on this determination, the client can decide whether to apply for the programs identified. Screening can be performed while logged into the citizen account.

Screening can be initiated while logged into the citizen account by selecting the Find Government and Community Help and choosing the Check if You are Eligible for Government Benefits option or by selecting to screen from the triage results page. When screening is initiated, in progress screenings are displayed (this occurs if the citizen has started a screening, exited without completing and have saved the screening) the citizen can choose to either start a new screening or to resume a previous screening. Note: completed screenings are not displayed. If the citizen has no in progress screenings, the citizen is brought directly to a page allowing them to select from a list of screenings.

6.10 Life Events

A life event is a situation that occurs in a citizens life which may result in a series of interactions between the citizen and the agency e.g. Marriage, birth of a child, death. UA Life Events provides an agency with the capability of configuring life events which enable a citizen to report significant life changes which may impact the programs and services that the citizen is receiving or is due to receive. Life events can also be configured such that they provide useful resources to the citizen about a particular life event, for example, a Finding a Job life event may also include links to job seekers websites and tips on how to write resumes and effective cover letters. This section describes life events functionality which is available from the citizen account.

6.10.1 Selecting a Life Event

The Citizen Account provides a citizen with a list of configured life events. A citizen can select a life event by choosing the My Information option in the account and selecting Update My Information. Common life events are displayed first. An agency can specify that a configured life event is common in UA life event administration. A life event is considered common if it is an event that may happen frequently in citizens lives, for example, having a baby, getting married, moving house. Displaying a list of common life events aims to prevent the user from having to search from a long list of life events to find the information required.

If a citizen cannot find the required life event in the list of common life events, a list of all configured life events is also provided. Life events can be categorized in UA administration so that a life event can be identified easily. For example, changing jobs, income changes and change of address life events could be categorized under 'Employment'. If a life event is neither common or categorized it is displayed in a General section.

A description of the category and the life event are provided so that a citizen can identify which life event will provide the information they need. The description of the category and the life event are configurable in UA life event administration.

On selection of a life event, a citizen is brought to a page which provides more information about the life event selected and also allows the citizen to submit information to agencies which relate to the selected life event.

Life events may also be informational i.e. They can be used to provide information to the citizen such as links to useful websites. This information can be defined in UA life event administration.

6.10.2 Submitting a Life Event

On starting the life event script, the citizen is presented with a guided set of questions (IEG) based on the life event selected. The question script is defined in UA life event administration when configuring a life event. When the details of the life event have been captured, a citizen will, if configured for the selected life event, be given the option to select the agencies they want the life event information to be sent to. This constitutes the citizens consent to send information to the selected agencies. The life event can be transmitted to a remote system via a web service and/or to the relevant case owners on a Cúram system via the evidence broker. The case owner will decide whether or not to apply them to the citizen's case. Note: a citizen does not have to have a case on the system to submit a life event, but the information submitted will therefore not be transmitted to a case owner. Instead it is stored internally and it will be up to the agency to decide what to do with this information.

The citizen is also provided with a list of community services and government programs (as per Triage) based on the life event submitted. This will enable the citizen to refer themselves for community services or to screen and/or apply for additional benefits. For example, if the client is already in receipt of Food Assistance and loses his job, he could apply for Unemployment Insurance Benefits. In order to display community services and programs a rule set must be associated with the life event in administration which will identify the services and programs to display to the citizen. An alternative configurable results

page can also be displayed depending on the rule set defined for the life event. For more information see see the IBM Cúram Universal Access Configuration Guide.

6.10.3 Submitted Life Events

A citizen is provided with a list of previously submitted life events. This is accessible from the My Updates page in the account. Information that a citizen has submitted previously via life events in the account is also visible from the My Information page.

Chapter 7. Defining Processes in IBM Cúram Universal Access

7.1 Introduction

IBM Cúram Universal Access offers predefined processes such as applications, screenings and life events. Customers may wish to define their own custom processes to meet the specific needs of the citizen. Motivations infrastructure allows customers to define their own processes and allow citizens access to these processes in the UA portal.

This chapter describes these key features in more detail.

7.2 Motivations

A motivation allows a customer to define their own processes and make them easily available from the citizen account, for example, Apply for Healthcare. A motivation consists of an IEG script, an associated data store schema, a data rule set and a display rule set. The script is used to define a set of questions that is displayed to a citizen when a motivation is initiated. A data store schema is used to store the answers provided by a citizen in the script. The data and display rule set are used to process and display the results. The results of running a motivation are displayed on a configurable results page. Configuration options include how to define how results are categorized, the available actions for particular results and a household member tool tip to represent the status of a person per program.

For more information on configuring a motivation and the results page see the `Cúram Universal Access Configuration Guide.`

Chapter 8. Securing IBM Cúram Universal Access

8.1 Introduction

All information captured by IBM Cúram Universal Access is secured so that only the citizen who entered the information has access to it. Each script that is executed is linked to a user account and when each page in a script is displayed, a check is performed to ensure that the current user is the user who owns the script information. This chapter outlines the user accounts used by IBM Cúram Universal Access.

8.2 User Accounts

Three separate user accounts are used by IBM Cúram Universal Access:

Generic Public Account
A Generic Public User Account is used when a citizen first accesses IBM Cúram Universal Access home page.

System Generated Account
Once the citizen moves away from the home page, the system generates a temporary user account and automatically logs the user onto the system using the generated credentials. This system generated account is used to secure any data that the citizen enters before they either create their own user account or log into an existing account. Once the citizen logs in, ownership of the data is transferred to the citizen's account.

Citizen Created Account
At various stages in IBM Cúram Universal Access the citizen has the option of either creating their own user account or logging into an existing account, once this is undertaken, the citizen's data is secured under this account. This account may be linked to a participant on the system of record which provides the citizen with access to all information accessible from the citizen account. As mentioned in 6.2, "Creating an Account and Logging In," on page 19 multifactor authentication can also be activated to allow for additional authentication when a citizen attempts logs in.

A number of configuration settings exist which apply to user name and password. The following can be defined:
- User name and password length
- The number of special characters that a password must consist of
- The minimum and maximum password length
- The maximum number of log in attempts before an account is locked out
- When citizens are required to change their password - this configuration can be specified in days or a date

The terms and conditions URL can also be defined.

8.3 External Security Integration

As an ever greater number of government services move to the Internet, there is a drive to ensure that citizens can be authenticated for any of these services using a single set of credentials. This provides benefits for the government in streamlining the authentication process and also for the citizen because they do not have to remember endless lists of usernames and passwords.

This, in turn, increases security by making it less likely that citizens will write down their usernames and passwords and by focusing security efforts on implementing best practise in a single Enterprise Security

System. In it's Out-of-the-Box form, IBM Cúram Universal Access uses it's own authentication system which is backed up by a database of registered users. IBM Cúram Universal Access can also now be configured to integrate with External Security Systems.

IBM Cúram Universal Access can be deployed in Identity Only mode for registered users so that account creation happens externally and user accounts defer externally for authentication. For full details on how to configure IBM Cúram Universal Access to integrate with external authentication systems see the `Cúram Universal Access Configuration Guide.`

Chapter 9. Conclusion

9.1 Summary of Main Concepts

The following is a summary of the main concepts covered in this guide:

- UA can be used to provide a greater number of citizens access to community services and government programs by allowing a citizen to perform key tasks without the assistance of a case worker.
- Citizens can use triage to quickly identify community services close to them and also easily identify government programs which meet their needs
- Citizens can screen themselves to determine their eligibility for government programs
- Citizens can apply for programs and subsequently track and manage their interactions with the agency using a secure citizen account
- Changes in a citizens circumstances can be easily reported to the agency using life events, thereby quickly determining whether existing benefits are effected.

Appendix. Citizen Account Messages

A.1 Payment Messages

This section describes messages for a payment issued, payment cancelled, payment due, payment stopped, payment unsuspended, over payment issued and under payment issued. A configuration setting is provided which allows an administrator to set the number of days (from the effective date) that payment messages should be displayed for.

Table 3. Payment Issued

Message Area	Description
Title	<Icon> Latest Payment
Message 1	Your latest payment of $22.00 was due on 22/07/2009. Click here to view the payment details. Your next payment is due on 29/07/2009. Click My Payments to view your payment history.
Message 2(Payment previously cancelled)	Your latest payment of $22.00 was due on 22/07/2009. Click here to view the payment details. This payment was originally cancelled on 23/07/2009. Click here to view details of the cancelled payment. Your next payment is due on 29/07/2009. Click My Payments to view your payment history.
Effective Date	Current Date
Notes	A payment can be issued, subsequently cancelled and then reissued. The 'here' hyper link opens a page showing payment details. The 'My Payments' link opens the My Payments page in the citizen account. Note: if no more payments are due the 'Your next payment is due on 29/07/2009.' part of the messages is not displayed.

Table 4. Payment Cancelled

Message Area	Description
Title	<Icon> Payment Cancelled
Message	Your payment of $22.00, due on 22/07/2009, has been cancelled. Click here to view the details. Click Contact Information to contact your case worker if you need more information. Your next payment is due on 29/07/2009. Click My Payments to view your payment history.
Effective Date	Current Date
Notes	If no more payments are due the 'Your next payment is due on 29/07/2009.' part of the message is not be displayed. The 'Contact Information' link opens the Contact Information tab in the citizen account. The 'My Payments' link opens the My Payments page in the citizen account.

Table 5. Payment Due

Message Area	Description
Title	<Icon> Next Payment Due

Table 5. Payment Due (continued)

Message Area	Description
Message	Your next Cash Assistance payment is due on 29/07/2011.
Effective Date	Current Date
Notes	This message is appropriate when it is the first payment a citizen will receive.

Table 6. Case Suspended

Message Area	Description
Title	<Icon> Payments Stopped
Message	Your Cash Assistance payments have been stopped from 29/07/2009. Click Contact Information to contact your case worker if you need more information.
Effective Date	Current Date
Notes	The 'Contact Information' link opens the Contact Information tab in the citizen account.

Table 7. Case Unsuspended

Message Area	Description
Title	<Icon> Payments Unsuspended
Message	Your Cash Assistance payment suspension has been lifted from 29/07/2009. Your next payment is due on 31/07/2009.
Effective Date	Current Date
Notes	None.

A.2 Meeting Messages

This section describes messages for a meeting invitation, a meeting cancellation and a meeting update. A configuration setting is provided which allows an administrator to set the number of days (from the effective date) that meeting messages should be displayed for.

Table 8. Meeting Invitation

Message Area	Description
Title	<Icon> Meeting Invitation - Meeting with case worker
Message 1(Not an all day meeting and the meeting start and end date are on the same day)	You have been invited to attend a meeting from 9.00AM until 5.00PM on 12/04/2010 in Meeting Room 1, Block C. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.
Message 2(All day meeting for one day only)	You have been invited to attend an all day meeting on 12/04/2010 in Meeting Room 1, Block C. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.

Table 8. Meeting Invitation (continued)

Message Area	Description
Message 3(All day meeting for multiple days)	You have been invited to attend an all day meeting each day from 12/04/2010 until 15/04/2010 in Meeting Room 1, Block C. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.
Message 4(Non-all day meeting for multiple days)	You have been invited to attend a meeting from 9.00AM until 5.00PM from 12/04/2010 to the 13/04/2010 in Meeting Room 1, Block C. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.
Notes	The location is an optional field when setting up a meeting. Therefore if a meeting location is not specified, the messages above will be displayed without a location. The Meeting organizers contact details are optional. Therefore if no contact details are found, the message above would display without organizers contact details.

Table 9. Meeting Cancellation

Message Area	Description
Title	<Icon> Cancellation - Meeting with case worker
Message 1(Not an all day meeting and the meeting start and end date are on the same day)	The meeting that you were scheduled to attend from 2.00PM until 6.00 PM on 12/04/2010 has been cancelled. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information.
Message 2(All day meeting for one day only)	The all day meeting that you were scheduled to attend on 12/04/2010 has been cancelled. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information.
Message 3(All day meeting for multiple days)	The all day meeting that you were scheduled to attend from 12/04/2010 until 15/04/2010 has been cancelled. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information.
Effective Date	Current Date.
Notes	The meeting organizer contact details link opens a page showing the organizers contact details.

Table 10. Meeting Update

Message Area	Description
Title	<Icon> Cancellation - Meeting with case worker
Message 1(Date and Time change of a non all day meeting)	The meeting that you were scheduled to attend from 2.00PM until 6.00 PM on 12/04/2010 has been rescheduled to 3.00PM until 7.00 PM on 13/04/2010 in Meeting Room 1, Block C. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.

Table 10. Meeting Update (continued)

Message Area	Description
Message 2(Location change of a non all day meeting)	The location of the meeting you are scheduled to attend from 2.00PM until 6.00 PM on 12/04/2010 has changed. This meeting will now take place in Meeting Room 1, Block D. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.
Message 3(Date, Time and Location change of non all day meeting)	The meeting that you were scheduled to attend from 2.00PM until 6.00 PM on 12/04/2010 has been rescheduled to 3.00PM until 7.00 PM on 13/04/2010. It will now be located in Meeting Room 2, Block C. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.
Message 4(Date change of all day meetings for multiple days)	The all day meeting that you are scheduled to attend from 12/04/2010 until 15/04/2010 has been rescheduled. This meeting will now take place from 13/04/2010 until 16/04/2010. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.
Message 5(Location change for all day meeting for multiple days)	The location of the all day meeting you are scheduled to attend from 12/04/2010 until 15/04/2010 has changed. This meeting will now take place in Meeting Room 1, Block D. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.
Message 6(Date and location change for all day meeting for multiple days)	The all day meeting that you are scheduled to attend from 12/04/2010 until 15/04/2010 has been rescheduled. This meeting will now take place from 13/04/2010 until 16/04/2010 in Meeting Room 1, Block D. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.
Message 7(Date change for an all day meeting)	The all day meeting that you are scheduled to attend on 12/04/2010 has been rescheduled. This meeting will now take place on 13/04/2010. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.
Message 8(Location change for an all day meeting)	The location of the all day meeting you are scheduled to attend on 12/04/2010 has changed. This meeting will now take place in Meeting Room 1, Block D. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.
Message 9(Date and location change for an all day meeting)	The all day meeting that you are scheduled to attend on 12/04/2010 has been rescheduled. This meeting will now take place on 13/04/2010 in Meeting Room 1, Block D. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.
Message 10(Date and Time change of a non all day meeting for multiple days)	The meeting that you are scheduled to attend from 2.00PM until 6.00 PM on 12/04/2010 until 15/04/2010 has been rescheduled. This meeting will now take place at 2.00PM until 6.00 PM on 13/04/2010 until 16/04/2010. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.

Table 10. Meeting Update (continued)

Message Area	Description
Message 11(Location change of a non all day meeting for multiple days)	The location of the meeting you are scheduled to attend from 2.00PM until 6.00 PM on 12/04/2010 until 15/04/2010 has changed. This meeting will now take place in Meeting Room 1, Block D. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.
Message 12(Date, Time and Location change of non all day meeting for multiple days)	The meeting that you are scheduled to attend from 2.00PM until 6.00 PM on 12/04/2010 until 15/04/2010 has been rescheduled. This meeting will now take place from 2.00PM until 6.00 PM on 13/04/2010 until 16/04/2010 in Meeting Room 1, Block D. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.
Notes	The location is an optional field when setting up a meeting. Therefore if a meeting location is not specified, the messages above will be displayed without a location. Also the Meeting organizers contact details are optional. Therefore if no contact details are found, the message above would display without organizers contact details.

A.3 Activity Messages

This section describes messages for a service, referral and action.

Table 11. Service

Message Area	Description
Title	<Icon> Physiotherapy
Message (Frequency and end date not specified)	This service will begin on 10/05/2010 and is provided by ABC Provider Inc. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information. Click My Activities for a full list of your activities.
Duration	Message displayed until day after the service start date.
Effective Date	A configuration setting is provided which dictates the number of days before the service start date that the service is displayed.
Notes	The provider link opens a page displaying provider details. The My Activities link opens the My Activities tab in the citizen account.

Table 12. Referral

Message Area	Description
Title	<Icon> Counselling
Message	You have been referred to ABC Provider Inc. on 22/04/2010. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information. Click My Activities for a full list of your activities.
Duration	Message is displayed until the day after the referral date.

Table 12. Referral (continued)

Message Area	Description
Effective Date	A configuration setting is provided which dictates the number of days before the referral start date that the service is displayed.
Notes	The provider link opens a page displaying provider details. The My Activities link opens the My Activities tab in the citizen account.

Table 13. Action

Message Area	Description
Title	<Icon> Participate in adult basic education
Message	This activity will begin on 10/05/2010. Please contact Joe Bloggs at 014567832 or Joe@SemAgency.com if you need more information. Click My Activities for a full list of your activites
Message 2	This activity will begin on 10/05/2010 until 26/07/2010. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information. Click My Activities for a full list of your activities.
Message 3	This activity will begin on 10/05/2010 for 3 hours every Monday & Thursday. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information. Click My Activities for a full list of your activities.
Duration	Message is displayed until the day after the action date.
Effective Date	Current Date
Notes	The My Activities link opens the My Activities tab in the citizen account.

A.4 Application Acknowledgement

This section describes messages for an application acknowledgement.

Table 14. Application Acknowledgement

Message Area	Description
Title	<Icon> TANF Application Acknowledgement
Message	We have received your TANF Application form. The status of this application is pending. We will contact you when the application has been processed.
Effective Date	Current Date.
Duration	A configuration setting is provided to allow an administrator to define the number of days (from the effective date) that the message should be displayed for.
Notes	None.

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