



What's New in IBM Cúram Social Program Management  
Version 6.0.5

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# Introduction

This document provides an overview of the new features and enhancements introduced in IBM Cúram Social Program Management Version 6.0.5.0. This document is organized by product. Within each product new features and enhancements for that product are listed.

The release notes provided with this release describe the issues that have been resolved in this release. A full set of product documentation is provided with this release.

# IBM Cúram Social Program Management Platform

## Cúram Enterprise Framework

### Integrated Case Management

#### SUPPORT THE AUTOMATION OF EVIDENCE ACTIVATION

A new feature has been introduced into evidence maintenance which provides the ability to automate the evidence activation step. A hook point has been exposed at the appropriate point of each evidence maintenance function which provides customers with the ability to automate activation of evidence changes. This feature is used primarily by Intake in support of straight through processing, to process an application through to ongoing case without caseworker intervention.

#### NEW CURAM EVIDENCE BUSINESS GUIDE SUPERSEDES THE CURAM TEMPORAL EVIDENCE GUIDE

A new Cúram Evidence Guide has been introduced to reflect the introduction of person and prospect person evidence, sharing of evidence and verifications. Existing customers who are not planning to use person and prospect person evidence can access the existing Cúram Temporal Evidence Guide which is available under a section called 'Superseded'.

#### ALLOW REGISTRATION AND SEARCHING FOR PERSONS AND PROSPECT PERSONS WITH SINGLE CHARACTER NAMES

Persons and prospect persons can be registered with single character surnames/first names and birth surnames.

Searches that search on a person name will return exact matches if a single character surname is entered as the search criteria. If a user enters more than 2 characters in the surname as part of a search, the system will continue to automatically append wildcards and therefore return all clients with at least the first 2 characters specified in the search criteria.

#### NEW ADDRESS FORMATS FOR CHINESE, TAIWANESE, SOUTH KOREAN, AND JAPANESE ADDRESSES

Four new address formats have been provided to support the capture and display of Chinese, South Korean, Japanese, and Taiwanese addresses.

#### NEW API FOR REGISTERING A PERSON

The person registration process requires a number of mandatory attributes in order to fully register a person in the system. When a client is applying for assistance online, they may choose not to enter all their information up front and provide it at a later stage in the process. Therefore mandating all this information at the point of entry may not be required. As an alternative, only the minimum data that the organization requires to identify the person may be mandated.

To facilitate this, a new Person Registration API provides the interface to the full person registration process. This allows customers to implement a person registration defining their own minimum mandatory information. The API will map the registration information defined onto PersonRegistrationDetails and populate the additional

mandatory fields the system requires for registration; such as setting the registration date as today and creating an address (this will be set to 'unavailable' if not specified as the minimum mandatory information).

The new API is used as part of the Cúram intake process whereby the minimum data required to register a client on an application is first name, last name, date of birth and gender.

#### DYNAMIC EVIDENCE FOR PERSON AND PROSPECT PERSON DATA

Dynamic evidence can now be configured and stored against a Person and Prospect Person in order to support centralised maintenance and end to end flow of evidence across cases.

A number of pre-defined dynamic evidence types are provided for Person/Prospect Persons:

- Bank Accounts
- Relationships
- Email Addresses
- Phone Numbers
- Addresses
- Names
- Identifications
- Birth and Death Details
- Contact Preferences
- Gender Details

These pre-defined evidence types are provided because they are required to ensure reliant system processes still operate correctly. For example, name, gender and identification are required to display on a number of screens throughout the application. Bank account information is required for issuance of benefits/programs.

Prior to the introduction of person/prospect person evidence, much of the information captured for these roles was stored as static data, yet fell into the definition of evidence. Evidence can be defined as information the customer tells us about themselves and is used to assess eligibility to programs and services. Because this information was stored as static data against a person/prospect person, it meant any changes required development. This also meant that the data could only be viewed and maintained at the person/prospect person level rather than with other evidence maintained on a case. Customers are now able to define their own evidence types and structure this in a way that applies to their own business needs and also decide where the evidence will be maintained.

One of the many benefits of person/prospect person data as evidence is that these dynamic evidence types can be configured against other case types thus allowing for centralized maintenance of evidence. For example when the above evidence is configured on an integrated case, it can be maintained along with all other evidence pertaining to all the members of the case. This provides a more holistic view of the household and their information and means the user does not have to maintain the information outside of the case. At a case level, this also has the added benefit of allowing the evidence to remain 'in edit' to allow for verification of the information before applying changes to the case.

A new Evidence list page is available in the Person and Prospect Person Tabs. This page displays a list of all of the recorded evidence types configured for a person/prospect person. From this list the user can edit the evidence, view summary details and a full history of modifications to the evidence. Unlike evidence maintained on a case, the evidence is applied immediately it is saved. However, when these evidence types are also configured at the case level the case evidence management process is applied i.e. any modifications will remain in an 'in edit' state until such time as the user decides to 'apply' them to the case - this way they are not immediately used in rules

processing until they are applied (previously, changes to this data at the person/prospect person level would have resulted in immediate reassessment).

Person and Prospect Person evidence type configuration can be viewed and maintained in the Administration 'Participants' section. Each evidence type can also be enabled for sharing using the Evidence Broker. The evidence type definitions, including validations can be viewed using the Dynamic Evidence Editor in the Administration application.

For more information relating to Person and Prospect Person evidence, refer to the following business guides:

- [Cúram Evidence Guide](#)
- [Cúram Participant Guide](#)

For information relating the technical aspects of the Person and Prospect evidence, please refer to the [Cúram Person and Prospect Person Evidence Developers Guide](#).

#### NEW EXTENSION POINTS FOR ELIGIBILITY AND ENTITLEMENT PROCESSING

The Cúram Eligibility and Entitlement Engine has been enhanced to provide new extension points that can be used by organizations to implement custom processing at various stages of the case reassessment process. The following three new extensions points have been provided.

Previously it was not possible to prevent reassessment from occurring at various points in the life cycle of a case, e.g. when changes to evidence are activated. It is now possible to do so through the use of a new extension point that can be used to stop reassessment processing so that no rules will be executed and no new determinations and decisions will be created. Because this prevents the creation of new decisions, the reassessment will also not result in any financial changes including the creation of over or underpayments.

Previously it was also not possible to prevent reassessment from updating the financial information on a case, including the creation of over or underpayments, when a new determination and decisions were created. An example of a scenario in which this might be required is if there is a requirement to "hold" case processing for a period of time to allow for a case worker to activate changes in evidence but to continue to work on the case before allowing the changes in circumstance to be reflected in updated financial information on the case. It is now possible for an organization to do so through the use of a new extension point that can be used to stop processing that would normally result in the creation of new financial details just after the new determinations and decisions have been recorded.

A new extension point has also been introduced that can be used in conjunction with the previous extension point to allow organizations to exclude specific decisions from case reassessment. This allows decisions that were created during the period when financial information was not being updated on the case to in effect be filtered out so that reassessment processing will not find that the existing decisions on the case no longer match the financials which have been paid out and attempt to correct the discrepancy by the creation of an over or underpayment.

For more information on these extension points please refer to Appendix D in the [Inside Cúram Eligibility and Entitlement Using Cúram Express Rules developers guide](#).

#### ABILITY TO RETRIEVE A LIST OF CASES POTENTIALLY RELATED TO ANOTHER CASE

A new API has been introduced that can be used to retrieve a list of cases that are potentially related to another case, for example, to retrieve a list of all investigation cases for a participant that could potentially be related to a

new intake case created for the participant. The API retrieves the list of cases by comparing the case participants of the case with the case participants of the other cases.

## Dynamic Evidence

### Evidence Maintenance

#### CASE PARTICIPANT PRE-POPULATED ON EDIT SCREEN

An evidence record which has a related case participant field set, that value will be pre-populated in the edit screen for that record.

Prior to this change, if a user created an evidence record containing a related case Participant attribute, that attribute was not being pre-populated in the modify screen of that record.

#### ADDRESS CAN NOT BE ADDED AS A SUMMARY PARAMETER

It was not possible to add an address attribute to the Summary Description in the previous release.

It is now possible to add an "Address" attribute to the Summary Description in the normal manner using the Evidence Editor. At run time, the address details will be seen as a comma separated list in the page description.

#### 'EFFECTIVE DATE OF CHANGE' FIELD CAN BE HIDDEN FOR SPECIFIED EVIDENCE TYPES

The 'Effective date of change' field displayed on evidence modification pages, can now be hidden from view as part of dynamic evidence configuration.

This was introduced to ensure that users either edit the evidence details held by correcting existing information or create a new record if appropriate. Effective date of change is still relevant for evidence where values within an evidence record can change over time.

For example, effective date of change, is not displayed for phone number evidence. This evidence captures a phone 'type', 'number', 'start date' and 'end date'. The start and end dates represent the period in which the phone number and type are in use. The phone number and type do not change over time but a client may advise that the phone number is no longer valid and may provide a new phone number. In this scenario, the user would end the phone number record and create a new one representing the new phone number. If the client advised that the phone number held was incorrect, the user would edit the record and correct the phone number.

An 'effective date of change' capture continues to be valid where the evidence contains data that does change over time. For example, an income evidence may record when employment started and ended along with an income amount and frequency. The income amount can vary after the employment started and so any change to that income can be updated from a new effective date.

In order to use this feature, a dynamic evidence type version can now be defined with a new 'Correction Only' property. If set to true, it will not be possible for the caseworker to enter an 'effective date of change' to an associated evidence record. It will only be possible to make corrections to that evidence record.



## Evidence Sharing

### SHARING OF NON-IDENTICAL EVIDENCE TYPES WITH SIMILAR STRUCTURE

Evidence of different types (non-identical) which contain identical attributes can now be shared by the evidence broker in the same way as identical evidence types.

This new feature allows for two different dynamic evidence types to share common data between cases. This is configured as it is currently done for identical evidence types, using the Evidence Broker shortcut link in the Administration application.

The main benefit of this feature is that cases requiring different evidence types for capturing some of the same data can now be accepted onto the target case. For example, one integrated case may contain an evidence type called 'Employment Earnings' which captures 'earningAmount', 'jobType' and 'earningsType'. Another integrated case contains an evidence type called 'Earnings' which captures 'earningAmount', 'earningsType' and 'frequency'. While these evidence types are non-identical, they both share 2 attributes which are common. If these are configured using this new feature, the evidence can be shared between the two cases in the same way as identical evidence types.

## Evidence Administration

### CASE PARTICIPANT CLUSTER FIELD LABELS CAN BE CHANGED THROUGH CONFIGURATION

It is now possible to modify the 'First Name' and 'Second Name' labels for a non-registered participant. This is done during the definition of the related Evidence Type Version from within the Dynamic Evidence Editor. Please see Cúram Dynamic Evidence Configuration Guide for more details on this configuration.

Previously, it was not possible to customize the 'First Name' and 'Second Name' field labels of the Related Case Participant widgets second panel. (The panel is that used to enter a new related case participant that is not registered on the system)

### CALCULATED ATTRIBUTES SUPPORT FOR USER ENTRY OR A CALCULATED VALUE

The value of a data attribute can now be calculated on 'Create' if the user has not provided any value for this attribute. This is achieved by linking the Data Attribute (to be calculated) to a Calculated Attribute defined in the Evidence Type. When the evidence Create page is submitted the system determines if the data attribute to be calculated is blank and if yes it uses the linked calculated attribute to determine and set the value of the data attribute. If the user specifies a value for the data attribute on the Create page, this value is saved in the database and no additional calculation is performed, i.e. the calculation mechanism is skipped.

### OPTION TO HAVE EVIDENCE DEFINED AS READ ONLY

An Evidence Type may be configured as being read only. In doing so it is possible to prevent modifications to an evidence record where that record is associated with a read only defined evidence type.

This would typically be used for evidence types that capture information from external systems. Because maintenance should only be made based on information from the external system, a user can now be prevented from updating the evidence directly.

## DYNAMIC EVIDENCE CONFIGURATION EXTRACTOR SUPPORTS OPTIONAL KEY RANGE PARAMETERS

Previously, the Dynamic Evidence Configuration Extractor accepted a mandatory key range which it used to change the primary keys of extracted database records.

This has been enhanced so the key range parameters are optional. This allows the extraction of database records with their current primary keys as recorded in the database.

## **Intake**

### INTAKE

Cúram Intake includes new features which allows an organization to easily configure and manage information pertaining to an application for programs. When an application is submitted by a client, there are a number of processing steps required to process the application through to completion. These steps include the creation of an application case, searching and matching clients, and authorizing the programs. A number of features are provided to support these steps. These features are described in detail below:

### **Application Case**

An application case is used to manage all of the information pertaining to an application for programs. An application case can be created in a number of ways depending on the organization's configurations:

- When an internal worker directly creates an application case for a client (no question script is required).
- When an internal worker submits an application form for a client (question script is required).
- When a citizen submits an application online via Universal Access.

When an application is submitted by a client, an application case is created. This case holds all application information including clients, programs applied for and evidence submitted with the application. Other management functions are also provided including Related Cases, Eligibility Checks, Priority, Complexity, Risk (PCR) and administrative functions such as Notes, Attachments, Communications, Meetings and Meeting Minutes.

### **Person Search and Match**

Cúram Intake provides an automated search and match feature that the organization can configure to use during the application case creation process. Search and Match automatically searches for registered

persons that match the details of the person applying for programs, and, based on configured search criteria, determine whether the applicant can be matched to a registered person automatically.

If the applicant can be automatically matched to an existing registered client record (a Cúram 'person') the system proceeds to create the application case and adds the person as a client to the application case.

If the applicant cannot be automatically matched, the system proceeds to create the application case and will either add the applicants as prospects or fully registered persons, depending on the results of the match search. The applicants are registered as prospects if there any potential matches on the system. The applicant is registered as a person and added to the application if there are no potential matches and the system has been configured to register persons automatically. Users can administer how the Person Search and Match feature behaves by configuring the search criteria to use and by assigning a weight to each criterion. The weight is used to determine how important the criterion is to the match outcome. The summation of the weights from a search result is

compared against configured threshold values which determine whether a result is an exact match, a possible match or not a match.

### **Configurable Program Authorization Process**

The intake process is completed when a decision is made with regard to the application for a program. This process can result in the approval or denial of the program. The authorization process identifies the

program(s) that can be approved on the application case. All clients on the application case must be registered as persons, and there must be at least one program with a status of Pending associated with

the application case before the authorization process can be invoked. If an application for a program is approved, the program authorization process is used to create the appropriate ongoing cases to deliver the benefit to the client. An integrated case is created or updated as a result of program authorization, and typically a product delivery is created for every program authorized. It is also possible that a product delivery is not created upon program authorization, but is created later on as part of the ongoing integrated case processing. Two configurable strategies for program authorization are provided:

- **Application Case Authorization:** The authorization process is invoked for an application case, and attempts to authorize all of the programs associated with the application case.
- **Program Authorization:** The authorization process is invoked separately for each program associated with the application case. An authorization strategy is defined for each program type and can differ from one program to another.

### **Straight Through Processing**

A Straight Through workflow can be defined which provides the organization with the option of defining a process that will authorize the programs on the application case automatically, and create the ongoing case without

worker intervention. If specified, the straight through workflow is invoked if all clients have been fully registered, i.e., there are no prospects on the application case.

### **Application Case and Program Administration**

Application cases can now be configured in the administration application. Program administration has also been enhanced to allow programs to be associated with application cases. Outlined below are the key administrative features:

- **Application Case Ownership:** Ownership strategies can be defined for application cases created as a result of applications submitted online from the Universal Access portal, and applications submitted internally.
- **Display Options:** The organization has the ability to configure the display options for internal users of the application case, including whether the Evidence Flow and/or Evidence Workspace are included on the application case, whether an application case can be created without going through an IEG script, and whether the user can set the application case to a status of Ready for Determination.
- **Program Authorization Strategy :** The organization has the ability to configure an authorization strategy, and an ongoing case creation strategy for integrated cases created as a result of program authorization.
- **Program Timers:** A number of configuration options are available, including the duration of the timer, whether the timer is based on business or calendar days, a warning period, and timer extension and approval. The organization can also configure the date from which a program timer should be invoked , i.e., the application date or the date the program was added to the application case. In addition,

workflows can be specified to be invoked when a timer starts, reaches the warning days, or passes the deadline.

- Workflow: Configuration allows for two workflows to be invoked when the application case is created: an Application Case Created workflow and a Straight Through workflow.
- Internal Application Scripts: Previously only online application scripts were configurable, the ability to configure the scripts for the internal application has now been added.

## Business Services

### CALENDAR EVENT CREATION UPON SELECTION OF A LOCATION SCHEDULE SLOT

An API has been provided that can be used to process a location schedule slot, such as a slot selected by a client who is scheduling an appointment online as part of an application process. The API accepts the following input parameters:

- Slot
- Slot Date
- Subject of the Activity to be created
- Priority of the Activity to be created
- Notes text for the Activity to be created

The API selects the first user that is assigned to a position assigned to the slot that has not been previously selected for the slot, allocates a work unit to the slot, creates a calendar event of type Activity, and adds the user as an activity attendee if a user can be determined. The activity will appear on the user's calendar. For the user, the Accepted Indicator is set to true and any calendaring conflicts are ignored.

## Technical Services

### NEW EVENT ADAPTOR TO SUPPORT CÚRAM INTEGRATION WITH THE INTELLIGENT OPERATIONS CENTER

Cúram now includes an Event Adaptor that provides a means for organizations to send data such as information about the volume of applications received to the Intelligent Operations Center where the information can be used by the Intelligent Operations Center to display, e.g. key performance indicator information in various types of dashboards such as heat maps.

The Event Adaptor provides a mechanism to publish events to the Intelligent Operations Center over Web Services using the Intelligent Operations Center's WebSphere Message Broker. It includes an API which allows for data to be supplied to the Intelligent Operations Center through the creation of Common Alerting Protocol (CAP) events that are sent to the Intelligent Operations Center.

System administration functionality has also been provided to allow administrators to enable the Event Adaptor through the use of an application property, enable and disable individual external event types, and configure the target system to where the Event Adaptor will dispatch events.

For more information, please refer to the Cúram Event Adaptor Guide.

## ENHANCEMENTS TO CONTENT MANAGEMENT INTEROPERABILITY SERVICES INFRASTRUCTURE

Several new features have been added to the Content Management Interoperability Services (CMIS) infrastructure to provide increased flexibility and further facilitate its use by organizations in the integration of Cúram with a Content Management System (CMS). The CMIS infrastructure now provides the following functionality:

- The ability to store metadata elements along with Attachment documents stored in a CMS
- The ability to use alternate CMS directory structure and folder naming strategies
- Functionality to facilitate the integration of Single Sign On (SSO) infrastructure, for use between Cúram and a CMS
- The ability to continue to retrieve documents from the database once CMIS integration is enabled

### **Metadata**

Previously limited metadata was being stored by default along with documents stored in a Content Management System. Additional metadata elements are now stored for all attachments, including attachments associated to recorded communications and Microsoft Word communications. By default 10 metadata elements may be stored and modified. The following ten metadata elements are enabled by default and may be disabled or enabled independently within the system administration application.

- Case Reference
- Participant Reference
- Participant First Name
- Participant Last Name
- Participant Date of Birth
- Document Type
- Document Type Code
- Document Receipt Date
- Communication Date
- Application Reference

The metadata that is stored and modified depends upon the attachment business flow, e.g. if the Case Reference metadata property is enabled, it will be stored for a case attachment created within an Integrated Case, but it will not be stored for a participant attachment created for a Person as it is not relevant.

It is also possible to set up a custom implementation to include additional metadata elements through the use of new metadata APIs that have been introduced.

### **Alternate CMS Directory Structure and Folder Naming Strategies**

The application currently provides a default strategy for the organization and naming of the directory structure used to store files in a CMS. The root directory is specified by the application property, `curam.cms.curam.dir`. Files are stored in folders that are created under this root directly corresponding to the date on which the file was stored and whether the file is related to an attachment or a pro forma communication.

The use of alternative strategies is now supported for organizations that have a requirement to structure the storage of files within the CMS in a different manner.

## **Support for Single Sign On (SSO)**

It is now possible for an organization to implement SSO to authenticate with the configured CMS using individual user credentials.

Due to the diversity of available solutions in the field of SSO, generic SSO support for the CMIS infrastructure has been provided. This support is an opt-in feature and the CMIS integration functionality will continue to default to using one global CMS account for all updates on an organization's configured CMS.

An extension point and an application property, `curam.cms.sso.enable`, have been provided to enable an organization to integrate with their SSO solution. Organizations must provide an implementation which integrates with their SSO solution for use at the extension point. Then, when the application property is enabled, the transmission of the global CMS username and password credentials is disabled, and the extension point implementation is invoked instead.

## **Retrieval of Documents from the Database once CMIS is enabled**

Previously if CMIS integration was not enabled and documents were stored in the application database, they could not be subsequently retrieved for viewing purposes from the database once CMIS integration was enabled.

It is now possible to retrieve and view documents previously stored in the database when CMIS integration is enabled.

For more information on each of the features described above, please refer to the *Cúram Content Management Interoperability Services Integration Guide*.

## **Rules Infrastructure**

### ENHANCEMENTS TO THE CÚRAM EXPRESS RULES INFRASTRUCTURE

New functionality has been added to the Cúram Express Rules (CER) infrastructure to provide further support in areas including localization and tooling. The CER infrastructure now includes the following features:

#### **Display Names for CER Rule Sets**

CER rule sets now support display names. This allows these names to be translated out-of-the-box and presented to the administrative user in the appropriate language. These new display names are optional for custom CER rule sets.

#### **Ability to Export CER Rule Sets**

In order to support accessibility requirements for CER rule sets it is now possible to extract the definition of CER rule sets and their associated properties files from the database into an xml file.

#### **Improved Logging for the Dependency Manager**

In order to enhance CER development productivity, new logging has been introduced for the dependency manager. This new logging is controlled by the existing logging levels described in Appendix D of the *Inside Cúram Eligibility And Entitlement Using Cúram Express Rules developers guide*.

## Ability to Configure Whether CER Cases are Reassessed Prior to Payment

Previously no application property was available for use to control whether or not to reassess CER product delivery cases prior to generating payments, therefore CER cases were always reassessed prior to being paid.

Eligibility and entitlement processing has now been updated to make use of the existing application property, 'curam.batch.generateinstructionlineitems.dontreassesscase', to provide the ability to configure whether or not CER cases should be reassessed prior to being paid.

More information about these features can be found in the release notes.

## Application Development Environment

### STRENGTHENED USER AND SYSTEM PASSWORD CRYPTOGRAPHY

The out-of-the-box default encryption strength for IBM Cúram Social Program Management has been increased. By default out-of-the-box, system passwords have been strengthened to 128-bit AES and user password digests to SHA-256.

In addition, new password encryption options have been provided. System passwords cipher options now include AES (128, 19 or 256 bit) and Triple DES (112 or 168 bit). User password digest options now include SHA-256, SHA-384 and SHA-512. Additional options for key management have also been provided. For more information about these new options, see the Cryptography sections in the Cúram Security Guide and Cúram Deployment Guide.

Support for previous encryption algorithms and strengths remains in place, for backward-compatibility. However Curam recommends the use of stronger encryption for better security and this is reflected in the out-of-the-box defaults. For more information about how to either take on or revert the strengthened encryption, see the Cúram Upgrade Guide (supplied with the 6.0.5 Upgrade Pack).

These changes conform to the National Institute of Standards and Technology (NIST) special publication SP800-131a: "Recommendation for Transitioning the Use of Cryptographic Algorithms and Key Lengths"

### ONLINE HELP CHANGES FOR 6.0.5.0

Online help has been enhanced to enable dynamic creation at runtime. The advantages of this for Online Help are:

- Cúram client build and deploy times are reduced.
- Dynamic UIM can now include online help by defining help.properties in the associated .property file.
- Online help is now available from a development build
- The help.war file no longer needs to be built and deployed.
- A STATIC\_CONTENT\_SERVER is no longer necessary to host generated help files, as the files are rendered dynamically when needed.

The following help build targets are also no longer required and have therefore been removed: \_help.build, help.clean, help.checkAssembleDependencies, help.assemble, help.html, help.checker, help.docbook, help.docmakerhelp, help.multivolumehelp\_

The ability to search across online help has been removed.

## Administration Suite

### NEW DESCRIPTION FOR THE 'NORTH AMERICAN INDIAN/ALASKAN' CODE TABLE ITEM

The description of the 'North American Indian/Alaskan' code table item in the Race code table has been changed to 'American Indian/Alaska Native' to reflect the term most commonly found on U.S Government websites.

### DISPLAY NAMES ADDED TO OUT OF THE BOX CONFIGURATION ARTEFACTS

Display names have been added to several configurable artifact types that are provided out-of-the-box with Cúram. When viewing information about these configurable artifacts in the administration application, these new display names are shown (previously, a technical name or ID was shown). This allows these names to be translated out-of-the-box and presented to the administrative user in the appropriate language.

For example: In 6.0.4 the code table describing whether a person was single, married, etc was presented as "maritalstatus" in the administration application. This code table will now be presented as "Marital Status" (or the appropriate translated term for a given language).

The new display names are optional for custom configuration. It is not required to add these to existing custom artifacts. When the system finds no display name content available (e.g. on a custom code table), it will display the artifact's technical identifier as before. Likewise, search functionality will continue to work for technical identifiers in addition to also looking at the new display names.

Display Names have been added in the following administration areas in this release:

- Workflow
- Cúram Express Rules (CER)
- Intelligent Evidence Gathering
- Data Store
- Code Tables
- Property Administration
- Batch Processes

More information about the changes for each type can be found in the release notes.

### LIST AND DROP DOWN DATA SORTING ARE NOW CULTURALLY AWARE

Sorting of textual data in Cúram lists and drop downs is now culturally-aware. This means that words containing various cultural characters are ordered in a manner that a user from this culture would expect.

Cúram now uses the advanced Unicode Collation Algorithm implementation to produce this string sort order to support these cultural environments.

\_See Chapter 9 Custom Data Conversion and Sorting of the IBM Cúram Social Program Management Cúram Web Client Reference Manual for details\_

### USER AUTHENTICATION CHANGES

Two changes have been made to out-of-the-box user authentication in this version.



1. The ability to change a user's login ID has been introduced
2. Administrative changes to a user's security role become active on the next login

### **User's login ID changes**

It is now possible to set Cúram up to allow changes to the username that a user logs in with.

For example, if user Rob Smith has a username 'rsmith' and he changes his last name to Jones, the username that he logs in with can be changed to 'rjones' (he will still retain an underlying identifier that does not change). If Robert subsequently leaves the organisation and Rachel Jones joins, it is possible to assign her the login username 'rjones' while preserving the distinction between Robert and Rachel in the system (e.g. in audit information).

To avoid impact to existing customers, this functionality is switched off by default. For existing customers that wish to switch it on, there is a small amount of effort required. For customers starting with this version, all that is required is to switch on a configuration setting. If this functionality is switched on, the administrative screens for adding, updating, and displaying Curam users will display the changeable ID in a new 'Login ID' field.

This feature does not change the requirement for all users to have an underlying unique, unchangeable identifier in the system. Technical changes have been made to enable better LDAP integration for these identifiers for new customers. Specifically, it is now possible for Cúram to use RFC-4530 unique IDs.

For more information, please see the "Alternate Login IDs" topic in the Cúram Security Guide.

### **User security role changes**

Administrative changes to a user's security role will now become active the next time the user logs in. Previously, it was necessary for an administrator to 'publish' user role changes before they became active.

# Cúram Platform Modules

## Verification

### CONDITIONALLY CREATING A VERIFICATION

A new feature has been introduced in Verification Engine which supports conditional verifications. This is achieved by integrating Verifications configuration with CER rules, where the conditions of verification can be defined. Integrating with CER Rules includes the ability to specify a display rules set to present the Verification information in the application.

Integrating with CER Rules introduces the consideration that verification conditions in the CER Ruleset may operate on a variety of data items, therefore when any one of these data items change, the verification conditions must be re-evaluated. This is achieved using the dependency manager.

### PROVIDE SUPPORT FOR VERIFICATION ITEMS GROUPS ON VERIFICATION REQUIREMENT

A new feature has been added to the Verification Engine which allows for grouping of verification items. Typically clients are given a number of options in terms of the documentation they need to supply to an agency in order to verify a piece of data and these options could be a set of documents. This change facilitates that. For example, to verify a client's identity, a passport or a birth certificate and a utility bill could be provided, or a photocopy of birth certificate and a bank statement and a utility bill, and so on.

The verification group feature is in addition to existing functionality. Customers can continue to use the existing list verification items functionality to satisfy evidence verification requirements.

This new verification group feature can be configured by administrators in the Administration application. A verification group can be defined, with one more documents specified for that group.

There is no difference in functionality from the caseworkers' perspective. Case workers add the documentation provided by the client as normal and the system evaluates these against any groups defined and against all verification requirements specified.

### INTRODUCE THE ABILITY TO DEFINE VERIFICATION DOCUMENTATION EITHER SHARED OR UNIQUE

To date the Verifications functionality has worked such that, if a client had more than one evidence record for a particular evidence type on a case and the client provides documentation to verify one of the evidence records, on capturing the verification documentation against the first evidence record it would by default be added by the system to the other evidence records of this type on the same case.

During analysis it was found that in some scenarios this may be the desired behaviour, for example, if a medical certificate can be used to certify more than one ailment the client is suffering. However in other scenarios it may not be the desired behaviour. For example, if a client has earnings from two separate employments then a payslip from one employment should not be used to verify the earnings from a separate employment.

A new feature has been introduced to allow customers to define a verification document as either shared or unique. Where a document is configured as shared then the behaviour is as before and the system can verify

multiple evidence records of the same type on a particular case for the client. Where a document is configured as unique then the system will only verify the evidence record it is added to and separate documents are required to verify the other evidence records of this type. For example where a client has more than one job and must verify the earnings by providing a payslip, the client must provide a separate payslip for each income record.

#### EXTENDING VERIFICATIONS ENGINE FOR NEW CASE TYPES

Up to 6.0.5.0 Verifications support was provided for evidence on Integrated Cases and Product Delivery cases and on Person level data. In 6.0.5.0, in support of Intake processing this support was extended to include evidence on Applications also. While delivering this requirement, the Verifications functionality involving case types was refined and centralized to provide a generic path to extending Verifications support to new case types. Now by following a defined set of technical steps, customers can themselves extend Verifications support to other case types. For further details on these technical steps, please refer to release note ENT-5490.

## **Supervisor Workspace**

#### CHANGES TO BULK CASE REASSIGNMENT AND TASK FORWARD FEATURES

Previously the system processing of bulk case reassignment and bulk task forwarding features was performed online but at high volumes this experienced performance problems which resulted in the actions timing on the supervisor. Therefore the implementation of these features has been changed to provide performance improvement and now the system processing for these features may happen in batch or deferred process rather than online.

Further to the performance improvements some application changes were introduced to make the technical approach of deferred reassignment more user friendly for the supervisor. Where a case or task reassignment will happen offline, it will be marked as such by the system. Any cases or tasks marked for later reassignment will no longer be presented in the Reassign Cases or Forward Tasks list pages and therefore this removes the possibility of multiple successive reassignments for a single case or task. Cases or Tasks marked for later reassignment will however continue to be listed as normal in original list, until such time as the reassignment actually occurs, and therefore a supervisor can continue to see and access the case or task if necessary. The threshold for when cases/tasks reassignment happens in batch mode is configurable and the configuration value will be made visible to the supervisor in the application via informational message, which allows the supervisor to make an inform decision when selecting the number of cases/tasks for bulk reassignment.

## **Evidence Broker**

#### INTEGRATION OF VERIFICATION ENGINE AND EVIDENCE BROKER

A new feature has been introduced which integrates Evidence Broker and Verification Engine functionality. This provides the ability to share verification documentation associated with a piece of evidence, when sharing that evidence from one case to another. A new configuration was added which allows customers to define whether to share verifications that exist with evidence.

Evidence Broker has been extended to cater for verification documentation incoming with evidence records and to initiate the Verification Engine functionality to handle this verification data appropriately on the target case, to evaluate the verification status of the evidence on the target case based on the incoming verification documentation.

#### PROVIDE THE ABILITY TO LIMIT THE EVIDENCE SHARED BETWEEN CASES

A new feature was added to Evidence Broker to allow customers to limit the evidence shared between source and target cases. New configuration is available and can be set per evidence type between each source and target case. Using this, customers can share evidence for a defined period of time, for example a specific number of months or years, or alternatively they can specify a set number of evidence changes to share as opposed to limiting based on time period. For example using this feature customers can now configure to share evidence changes made in the latest three months, or share only the last four changes to evidence regardless of the time period these changes fall into. This feature could be useful for evidence types that change frequently and therefore rather than share all changes, perhaps only the latest information is relevant. It also helps to reduce the volume of data shared between cases, especially where some of this data is considered out of date information.

#### PROVIDE THE ABILITY TO CUSTOMIZE THE SHARING FUNCTIONALITY IN EVIDENCE BROKER

Changes have been introduced which offer customers some control over the Evidence Broker functionality provided OOTB.

Previously control over what evidence gets shared by the Evidence Broker was defined by the configuration set in the administration application. A hook point has now been added to allow custom logic to be implemented that will check whether anything needs to be added to, or removed from the list of evidence to be shared. This provides the ability to customize what to share.

Additionally, a change providing the ability to customize when to share is now available. By default, Evidence Broker functionality shares evidence when activating evidence on a case, when a new case is created and when a client is added as a case member onto an existing case. New functionality has been introduced which allows evidence sharing to be bypassed when a new case is created and when the client is added as a case member onto an existing case. Release notes are provided for the technical details on how this can be achieved.

#### ALLOW CONFIGURATION TO AUTOMATE EVIDENCE ACTIVATION ON TARGET CASE

A new feature has been introduced to Evidence Broker to automatically activate evidence received onto the target case. This is a new configuration setting in Evidence Broker and it is only applicable where the evidence is configured to be automatically accepted onto the target case. It supports the automation of all steps involved in getting evidence onto a target case and into a state where it is ready for immediate use on that case, e.g. for use in eligibility and entitlement calculation, without any manual intervention. Therefore this feature is supporting straight through processing.

## **Intelligent Evidence Gathering**

#### SKIP FIELDS INTRODUCED.

IEG now supports a new script element called a Skip Field. A skip field can be used to occupy the space allocated to a question within a cluster or a footer row. Clusters with multiple columns display elements in a left to right, top to bottom order. The addition of skip fields allows a script designer more flexibility in the layout of their questions.

#### EDIT LINKS CAN LINK TO SPECIFIC CLUSTERS ON A QUESTION PAGE.

The user experience of editing previously answered questions in IEG has been improved. The edit links on a Summary page can now be configured to target specific clusters on a question page. The user will only see the questions that are relevant to the answers they are attempting to change. This is of particular importance where the IEG script has question pages with a large number of questions.

#### RELATIONSHIP PAGES SUPPORT DISPLAY TEXT

IEG Relationship Pages now support Display Text. Display text is often used on an IEG Question or Summary page to provide business context for the user. To improve the readability of these pages where relationship questions are repeated for each relationship, the Display Text is only rendered once at the top of the page. This ensures the user understands the context of this page before answering any relationship questions.

#### ENHANCEMENTS TO IEG LIST FUNCTIONALITY

Three new features have been added to the list functionality in IEG: lists now support a footer row, online help can be added to each row in a list and an alternative styling has been provided for lists.

Summary or total information is often required for lists of data. IEG lists now support a footer row element which can be used to display this information. A footer row is displayed as an additional row at the bottom of a list.

IEG supports contextual help at the question level by allowing a script designer to provide help text for each question. This functionality is now also supported for lists. Help text can be provided at the row level for lists allowing the script designer to provide context for the information displayed in each row.

IEG lists and clusters are often displayed together on summary pages. As the styling for lists and clusters is quite different, a summary page containing both lists and clusters could have an inconsistent appearance. A new configuration property has been added to IEG which allows for an alternative styling to be applied to lists. This property controls the appearance of lists and allows them to be styled consistently with clusters. Additional configuration for list headers has also been provided.

# IBM Cúram Business Intelligence and Analytics

## SUPPORT FOR BUSINESS INTELLIGENCE COMPONENTS FOR THE DB2 PLATFORM

In order to provide support for the data warehouse and analytical charts provided within Curam's Business Intelligence and Analytics component on a DB2 platform, ETL support has now been provided with InfoSphere Warehouse. Please refer to the v6.0.5 prerequisites for further details - <http://www-01.ibm.com/support/docview.wss?uid=swg27036661>

# IBM Cúram Appeals

## REDESIGN OF THE PROCESS TO CREATE AN APPEAL

reviously, one complex Appeal creation process existed to cater for all circumstances including:

- Creating a new appeal
- Appealing a decision on a prior appeal
- Linking appeals across participants
- Linking appeals across cases

To add to the complexity, users had to navigate to different Appeal creation pages depending on the Appeal Type and they were also allowed to navigate down paths that were not in line with the configured Appeal process.

This complexity has been removed in Cúram version 6.0.5 by making the following changes:

- A separate process is now used to create a new appeal and this has been standardized across all three appeal types so that the same creation page is used regardless of the type of Appeal being created
- The appeal of a decision on a prior appeal is now initiated from the row level action menu on the Appeals List page. This action creates the relationship between the two Appeals.
- The appeal creation process is now more closely aligned with the configured Appeal Process so that only relevant options are presented to the user
- Appeals list screens now include appeals for all participants of the case so linking of appeals across cases and participants is now initiated from here rather than from within the creation process
- Users can now navigate through the Appeal creation process more easily and efficiently

Previously it was only possible to appeal case types of Integrated Case, Product Delivery and Issue Cases. The appeal of an Application Case program is provided to support the new intake process.

Appeals has also been refactored to allow for the appeal of other case types. Note that development work is required for each such case type and this is documented in the Appeals Developer guide.

# IBM Cúram Universal Access

## UNIVERSAL ACCESS - NEW USER INTERFACE

A new user interface has been applied to the Universal Access portal. The new UI includes a banner, mega menus, a new side menu and transitions. This allows for easier navigation throughout the portal.

The banner includes a Find Government and Community Help section that can be configured to display mega menus. Triage, Apply for Benefits and Check for Eligibility processes can be accessed from these mega menus. The mega menus can also be configured in administration to include other processes e.g., Apply for Healthcare.

Note that a new landing page has also been provided which also contains links to the Triage, Apply for Benefits and Check for Eligibility processes.

Additionally, the citizen account has been updated such that the navigation bar is now displayed on the left hand side.

## UNIVERSAL ACCESS ACCOUNT FUNCTIONALITY ADDED TO THE PERSON HOME PAGE

New functionality has been added that allows a user to create, enable, and disable a Universal Access account from a Person home page.

## RESET PASSWORD FUNCTIONALITY ADDED

A Reset Password function has been added to Universal Access which allows a citizen to reset their password when logged into the citizen account.

## TWO CITIZEN ACCOUNT VIEWS PROVIDED

Two different views of the citizen account are now provided; one for a linked citizen, i.e., a user whose account is linked to a concernRole in Cúram and one for a standard user, i.e., a user whose account is not linked to a concernRole in Cúram.

A linked citizen can access payments, activities, applications, in progress screenings, my updates, i.e., submitted life events, and My Information. My Information is a new view that allows a citizen to view information the agency has stored about them. The information the citizen sees is configurable in the administration application. A standard user will have access to applications and in progress screenings only.

## INFORMATION UPDATES AND MY INFORMATION

Two new pages have been added to Universal Access; Information Updates and My Information. These pages are accessible when a citizen logs into their citizen account.

### **Information Updates**

Common Life Events and All Life Events have now been merged and are now displayed on the Information Updates page.



## **My Information**

The My Information page displays evidence associated with a social record case. A social record case is a new case construct used by Universal Access to store client information submitted as part of a life event.

### ENHANCED MAPPING OF LIFE EVENT INFORMATION TO CASES

Mapping life event information to cases is now configurable as part of application administration. Previously, when a client submitted a life event, development was required to map the data entered by the client to their cases. Information gathered in the life event script is stored in the data store schema defined for the life event. This information is then mapped to pre-defined dynamic evidence entities that are specified as social record evidence types.

The Data Mapping Editor is then used to map the data from the data store to the appropriate evidence entities. When a life event is submitted, the information entered is mapped (using the mappings defined in the Data Mapping Editor) to evidence entities that are associated with a new case type called a social record case. The Evidence Broker is then used to pass the information from this case to the appropriate ongoing client cases. For more information, see the *Cúram Universal Access Configuration Guide*.

### INTEGRATION OF UNIVERSAL ACCESS WITH INTAKE

Program administration in Universal Access has been updated such that an intake processing system can be configured. When a new program is added, the ability to select the system to use for the intake processing is provided. This allows for integration with *Cúram Intake*.

### DATA MAPPING EDITOR ENHANCED TO SUPPORT CODE TABLE MAPPING

Attributes which are defined as code tables can now be explicitly mapped to evidence attributes defined as code tables.

# IBM Cúram Outcome Management

## ACCESSIBLE VERSION OF ACTIVITY RECOMMENDATIONS

A Recommendations list is now provided to list the latest recommendations for an outcome plan. This recommendation list provides an accessible version of the existing recommendations panel available from the activity workspace. The recommendations listing works in a similar manner to the existing workspace recommendations in that it lists both plan and factor recommendations and provides the ability to add recommended activities.

# IBM Cúram Universal Access Entry Edition

## UNIVERSAL ACCESS - NEW USER INTERFACE

A new user interface has been applied to the Universal Access portal. The new UI includes a banner, mega menus, a new side menu and transitions. This allows for easier navigation throughout the portal.

The banner includes a Find Government and Community Help section that can be configured to display mega menus. Triage, Apply for Benefits and Check for Eligibility processes can be accessed from these mega menus. The mega menus can also be configured in administration to include other processes e.g., Apply for Healthcare.

Note that a new landing page has also been provided which also contains links to the Triage, Apply for Benefits and Check for Eligibility processes.

Additionally, the citizen account has been updated such that the navigation bar is now displayed on the left hand side.

## UNIVERSAL ACCESS ACCOUNT FUNCTIONALITY ADDED TO THE PERSON HOME PAGE

New functionality has been added that allows a user to create, enable, and disable a Universal Access account from a Person home page.

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A linked citizen can access payments, activities, applications, in progress screenings, my updates, i.e., submitted life events, and My Information. My Information is a new view that allows a citizen to view information the agency has stored about them. The information the citizen sees is configurable in the administration application. A standard user will have access to applications and in progress screenings only.

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Mapping life event information to cases is now configurable as part of application administration. Previously, when a client submitted a life event, development was required to map the data entered by the client to their cases. Information gathered in the life event script is stored in the data store schema defined for the life event. This information is then mapped to pre-defined dynamic evidence entities that are specified as social record evidence types.

The Data Mapping Editor is then used to map the data from the data store to the appropriate evidence entities. When a life event is submitted, the information entered is mapped (using the mappings defined in the Data Mapping Editor) to evidence entities that are associated with a new case type called a social record case. The Evidence Broker is then used to pass the information from this case to the appropriate ongoing client cases. For more information, see the *Cúram Universal Access Configuration Guide*.

### INTEGRATION OF UNIVERSAL ACCESS WITH INTAKE

Program administration in Universal Access has been updated such that an intake processing system can be configured. When a new program is added, the ability to select the system to use for the intake processing is provided. This allows for integration with *Cúram Intake*.

### DATA MAPPING EDITOR ENHANCED TO SUPPORT CODE TABLE MAPPING

Attributes which are defined as code tables can now be explicitly mapped to evidence attributes defined as code tables.

# IBM Cúram Income Support

## HEAD OF HOUSEHOLD EVIDENCE

The head of household selected is usually an adult parent of children living in the household, or an adult who has parental control over children living in the household. A head of household must be selected for the Cash Assistance and Food Assistance program.

Income Support functionality will now support the change of head of household. Previously the user did not have the ability to start or end date Head of Household Evidence as the user interface did not display the start and end date fields to the user. A user could not add a new Head of Household Evidence record when one already existed when there was an active product delivery for the program the record was associated with.

Head of Household Evidence now allows the user to start and end date an evidence record. This allows a user to end date the current record and add a new record if they are required to change the head of household on a case. Validations on the evidence entity, Cash and Food Assistance rules and Cash and Food Assistance product deliveries have been updated to support this change and display the correct head of household once changed.

For example; if a head of household is changed, on evidence apply changes it will initiate change in circumstance processing and determine the impact of the change to any existing Food Assistance product deliveries.

If the user selects a head of household who has no bearing on the current product deliveries the product delivery may reassess as invalid. The user should select an appropriate head of household when changing.

## INTEGRATED CASE PROGRAM AUTHORIZATION

Previously program authorization was only supported through the application. The user will now have the ability to authorize results from the integrated case without the requirement of an application. The user may initiate eligibility checks from the Income Support integrated case and authorize the result and create a new product delivery if the unit is not already in receipt of the program being authorized.

This will support movement between Medical Assistance coverage types.

## INCOME SUPPORT HOUSEHOLD RELATIONSHIP EVIDENCE

Household Relationship Evidence, which records the relationship of a household member to all other household members, is captured to determine the possible eligible groups that exist within the household. When a new relationship record is inserted, the system will automatically insert a reciprocal relationship record for the related household member. Additional details specific to the case are captured on the household relationship evidence record, for example, whether or not the household member is a non-parent caretaker relative.

Household Relationship Evidence is now implemented as a new dynamic evidence entity on the Income Support integrated case. The entity is called Domestic Relationship but will be displayed within the Cúram application as Household Relationship. All Income Support rules and processing have been updated to use the new Income Support Household Relationship entity(domesticRelationship). The entity attributes are defined the same as the previous relationship entity with the exception of partner indicator which is not included.

### **domesticRelationship**

evidenceID

caseParticipantRoleID

relationShipType

recipCaseParticipantRoleID

primaryCaretakerInd

dependentInd

startDate

endDate

comments

The previous Household Relationship entity will no longer be displayed to the user on the evidence dashboard within the Income Support integrated case. If the old relationship entity is required, it can be configured back onto the required cases. This can be achieved through the Cúram Administrator Application. Select 'Case', then select the case type you would like to configure. Then select 'Evidence Types' and the action 'Add Evidence'. For example select a case type of integrated case 'Income Support' to configure evidence types on that case. Select to add Household Relationship. The new version of the household relationship entity should be removed if not required from the list of evidence types on the case.

#### CHANGES OF CIRCUMSTANCE

Change of circumstance processing has been introduced to support the application of changes which impact household composition for existing product deliveries. Change of circumstance processing has been implemented for Cash and Food Assistance. This will support the following common changes of circumstance which can occur within these programs, for example:

1. The addition of a new household member.
2. A household member leaving the integrated case, their household member record end dated.
3. Changes to the head of household.
4. The death of a household member.

#### **Change of Circumstance Processing**

Change of circumstance processing is initiated on 'apply changes' when specific evidence that causes the household composition to change is modified and there are existing product deliveries on the integrated case. This processing determines the impact of the evidence change for programs that currently exist on the integrated case and are not closed. Change of circumstance processing executes an eligibility check at the integrated case with the exception of application specific rules and period of ineligibility processing.

The following processing occurs:

1. The user records evidence updates which are defined as impacting household composition.
2. The user selects to 'Apply Changes' to activate the evidence.
3. The system initiates the change of circumstance processing.
4. System determined eligibility results are displayed on the integrated case under the eligibility checks tab.

5. The user can manually action results from the eligibility checks tab, apply updates to existing product deliveries or authorize a new product delivery.
6. Specified changes such as the addition of a mandatory member(s) only, change of head of household or end dated household members are applied automatically by the system. The system should not require the user to apply the update.
7. Once the user or the system applies updates to existing product deliveries the decisions are then updated on the product delivery. The display rules show any changes to unit composition or other areas if impacted.
8. The member groups are updated to reflect any changes within the member group, assistance group and financial group.

Note:

The system should apply certain updates such as end dating a household member, or the addition of mandatory members to a product delivery automatically. Also rules should not execute application specific rules when determining the impact against an existing product delivery. Both of these items will be addressed in a future release.

### **Change of Circumstance Evidence**

Evidence which impacts household composition has been defined per program. If this evidence is applied it initiates the change in circumstance processing.

### **Cash Assistance Change of Circumstance Evidence**

- Household Member
- Household Relationship
- Death
- Absence
- Deprivation
- Countable Assistance History
- Exemption
- Extension

### **Food Assistance Change of Circumstance Evidence**

- Household Member
- Household Relationship
- Death
- Meal Group Member
- Head of Household
- Working Hours

Configurations around federal time limits and ABAWD won't be fully delivered until a future release.

### ALIGNMENT OF EVIDENCE WITHIN INCOME SUPPORT PROGRAMS

Changes reported by a household may impact the household's allotment and eligibility which is determined monthly. For this reason, changes that do impact the allotment and eligibility should only ever cause the decisions to split at monthly intervals. Previously when a change of circumstance was entered, the change would impact the

allotment and eligibility from the date the change was reported for, the start date or effective date of the change. The decisions would split on these dates, the start date of the evidence of if a change, the effective date if entered.

For example, previously if the date (start date/effective date) of change occurred on Jan 13th, eligibility, benefit amounts and decisions would reflect this change from Jan 13th.

An alignment algorithm has been implemented to allow alignment of evidence through system configuration. Evidence may be configured per program. Decisions now reflect the dates evidence is configured to align to. The decisions show the caseworker when the reported change impacts the household's allotment and not the date the change occurred from.

In the example above, now that evidence has been configured to align; eligibility, benefit amounts and the decisions reflect this change from Feb 1st.

### **Alignment Algorithm**

An alignment algorithm is implemented for income and resource evidence for Cash Assistance and Food Assistance as follows:

1. If the start date of the evidence is before or equal to the start date of the household member then the evidence is aligned to the household member start date.
2. If the start date of the evidence is before the product delivery activation date then the start of the evidence is not aligned.
3. If the start date of the evidence is after the household member start date AND after the product delivery activation date then it is aligned to the start of the next month UNLESS the evidence is Head of Household and the previous Head of Household date of death is in the same month.
4. If the end date of the evidence is not on the last day of the month, the evidence end date is aligned to the end of the current month.
5. If the household member date of death is specified then instead process the end of all evidence records from the person's date of death.
6. If a new household member is added they take effect immediately.

Note:

1. All evidence may be configured in a similar manner.
2. Alignment will only occur on reassessment of an ongoing case for evidence which has been configured to align.

### ACA UPDATES

The Affordable Care Act (ACA) introduced new requirements for states in relation to making affordable health care available to state residents, not just through the existing Medicaid and Children's Health Insurance Programs, but also through the introduction of new programs to provide help paying for private health insurance. In support of the ACA legislation, the IBM Cúram Income Support and IBM Cúram Income Support for Medical Assistance products have been extended to support the following features:

- Online application and eligibility determinations for the range of Insurance Affordability Programs (comprising Medicaid, CHIP, the State Basic Plan, Advanced Premium Tax Credits and Cost-Sharing Reductions)
- Integration with the Federal Data Services Hub to carry out any necessary electronic verifications in support of Insurance Affordability applications



- Vendor-neutral integration with a plan management system to support shopping for Qualified Health Plans in a Health Insurance Exchange using the information provided as part of an application and any calculated entitlements
- Intake processing for Insurance Affordability applications, which includes support for straight-through processing of application cases where information has already been e-verified
- On-going management, including change-in-circumstance processing, of Insurance Affordability cases through the introduction of a new Integrated Case and a range of Product Delivery cases
- The ability to report changes to the information provided by an applicant through a range of life events available in the Citizen Account
- Online applications, integration with the plan management system, intake processing and ongoing case management for citizens who apply to use the exchange without any financial help
- Online applications, intake processing and ongoing case management for citizens who apply for an exemption from the individual mandate which requires them to obtain public or private health insurance for themselves and their dependents
- Online applications, integration with the plan management system, intake processing and ongoing case management for employees who wish to avail of employer-sponsored insurance provided through the Small employer Health Options Programme (SHOP)
- Support for appealing any decisions made by the system and managing the lifecycle of any such appeals
- Support for registering Navigators who will be available to assist citizens with their applications; support for citizens searching for Navigators on a map and creating referrals to them; support for recording which Navigators assisted which citizens and with which functions

# IBM Cúram Income Support for Medical Assistance

## HEAD OF HOUSEHOLD EVIDENCE

The head of household selected is usually an adult parent of children living in the household, or an adult who has parental control over children living in the household. A head of household must be selected for the Cash Assistance and Food Assistance program.

Income Support functionality will now support the change of head of household. Previously the user did not have the ability to start or end date Head of Household Evidence as the user interface did not display the start and end date fields to the user. A user could not add a new Head of Household Evidence record when one already existed when there was an active product delivery for the program the record was associated with.

Head of Household Evidence now allows the user to start and end date an evidence record. This allows a user to end date the current record and add a new record if they are required to change the head of household on a case. Validations on the evidence entity, Cash and Food Assistance rules and Cash and Food Assistance product deliveries have been updated to support this change and display the correct head of household once changed.

For example; if a head of household is changed, on evidence apply changes it will initiate change in circumstance processing and determine the impact of the change to any existing Food Assistance product deliveries.

If the user selects a head of household who has no bearing on the current product deliveries the product delivery may reassess as invalid. The user should select an appropriate head of household when changing.

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This will support movement between Medical Assistance coverage types.

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Household Relationship Evidence is now implemented as a new dynamic evidence entity on the Income Support integrated case. The entity is called Domestic Relationship but will be displayed within the Cúram application as Household Relationship. All Income Support rules and processing have been updated to use the new Income Support Household Relationship entity(domesticRelationship). The entity attributes are defined the same as the previous relationship entity with the exception of partner indicator which is not included.

### **domesticRelationship**

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caseParticipantRoleID

relationShipType

recipCaseParticipantRoleID

primaryCaretakerInd

dependentInd

startDate

endDate

comments

The previous Household Relationship entity will no longer be displayed to the user on the evidence dashboard within the Income Support integrated case. If the old relationship entity is required, it can be configured back onto the required cases. This can be achieved through the Cúram Administrator Application. Select 'Case', then select the case type you would like to configure. Then select 'Evidence Types' and the action 'Add Evidence'. For example select a case type of integrated case 'Income Support' to configure evidence types on that case. Select to add Household Relationship. The new version of the household relationship entity should be removed if not required from the list of evidence types on the case.

#### CHANGES OF CIRCUMSTANCE

Change of circumstance processing has been introduced to support the application of changes which impact household composition for existing product deliveries. Change of circumstance processing has been implemented for Cash and Food Assistance. This will support the following common changes of circumstance which can occur within these programs, for example:

1. The addition of a new household member.
2. A household member leaving the integrated case, their household member record end dated.
3. Changes to the head of household.
4. The death of a household member.

#### **Change of Circumstance Processing**

Change of circumstance processing is initiated on 'apply changes' when specific evidence that causes the household composition to change is modified and there are existing product deliveries on the integrated case. This processing determines the impact of the evidence change for programs that currently exist on the integrated case and are not closed. Change of circumstance processing executes an eligibility check at the integrated case with the exception of application specific rules and period of ineligibility processing.

The following processing occurs:

1. The user records evidence updates which are defined as impacting household composition.
2. The user selects to 'Apply Changes' to activate the evidence.
3. The system initiates the change of circumstance processing.
4. System determined eligibility results are displayed on the integrated case under the eligibility checks tab.

5. The user can manually action results from the eligibility checks tab, apply updates to existing product deliveries or authorize a new product delivery.
6. Specified changes such as the addition of a mandatory member(s) only, change of head of household or end dated household members are applied automatically by the system. The system should not require the user to apply the update.
7. Once the user or the system applies updates to existing product deliveries the decisions are then updated on the product delivery. The display rules show any changes to unit composition or other areas if impacted.
8. The member groups are updated to reflect any changes within the member group, assistance group and financial group.

Note:

The system should apply certain updates such as end dating a household member, or the addition of mandatory members to a product delivery automatically. Also rules should not execute application specific rules when determining the impact against an existing product delivery. Both of these items will be addressed in a future release.

#### **Change of Circumstance Evidence**

Evidence which impacts household composition has been defined per program. If this evidence is applied it initiates the change in circumstance processing.

#### **Cash Assistance Change of Circumstance Evidence**

- Household Member
- Household Relationship
- Death
- Absence
- Deprivation
- Countable Assistance History
- Exemption
- Extension

#### **Food Assistance Change of Circumstance Evidence**

- Household Member
- Household Relationship
- Death
- Meal Group Member
- Head of Household
- Working Hours

Configurations around federal time limits and ABAWD won't be fully delivered until a future release.

#### **ALIGNMENT OF EVIDENCE WITHIN INCOME SUPPORT PROGRAMS**

Changes reported by a household may impact the household's allotment and eligibility which is determined monthly. For this reason, changes that do impact the allotment and eligibility should only ever cause the decisions to split at monthly intervals. Previously when a change of circumstance was entered, the change would impact the

allotment and eligibility from the date the change was reported for, the start date or effective date of the change. The decisions would split on these dates, the start date of the evidence of if a change, the effective date if entered.

For example, previously if the date (start date/effective date) of change occurred on Jan 13th, eligibility, benefit amounts and decisions would reflect this change from Jan 13th.

An alignment algorithm has been implemented to allow alignment of evidence through system configuration. Evidence may be configured per program. Decisions now reflect the dates evidence is configured to align to. The decisions show the caseworker when the reported change impacts the household's allotment and not the date the change occurred from.

In the example above, now that evidence has been configured to align; eligibility, benefit amounts and the decisions reflect this change from Feb 1st.

### **Alignment Algorithm**

An alignment algorithm is implemented for income and resource evidence for Cash Assistance and Food Assistance as follows:

1. If the start date of the evidence is before or equal to the start date of the household member then the evidence is aligned to the household member start date.
2. If the start date of the evidence is before the product delivery activation date then the start of the evidence is not aligned.
3. If the start date of the evidence is after the household member start date AND after the product delivery activation date then it is aligned to the start of the next month UNLESS the evidence is Head of Household and the previous Head of Household date of death is in the same month.
4. If the end date of the evidence is not on the last day of the month, the evidence end date is aligned to the end of the current month.
5. If the household member date of death is specified then instead process the end of all evidence records from the person's date of death.
6. If a new household member is added they take effect immediately.

Note:

1. All evidence may be configured in a similar manner.
2. Alignment will only occur on reassessment of an ongoing case for evidence which has been configured to align.

### ACA UPDATES

The Affordable Care Act (ACA) introduced new requirements for states in relation to making affordable health care available to state residents, not just through the existing Medicaid and Children's Health Insurance Programs, but also through the introduction of new programs to provide help paying for private health insurance. In support of the ACA legislation, the IBM Cúram Income Support and IBM Cúram Income Support for Medical Assistance products have been extended to support the following features:

- Online application and eligibility determinations for the range of Insurance Affordability Programs (comprising Medicaid, CHIP, the State Basic Plan, Advanced Premium Tax Credits and Cost-Sharing Reductions)
- Integration with the Federal Data Services Hub to carry out any necessary electronic verifications in support of Insurance Affordability applications

- Vendor-neutral integration with a plan management system to support shopping for Qualified Health Plans in a Health Insurance Exchange using the information provided as part of an application and any calculated entitlements
- Intake processing for Insurance Affordability applications, which includes support for straight-through processing of application cases where information has already been e-verified
- On-going management, including change-in-circumstance processing, of Insurance Affordability cases through the introduction of a new Integrated Case and a range of Product Delivery cases
- The ability to report changes to the information provided by an applicant through a range of life events available in the Citizen Account
- Online applications, integration with the plan management system, intake processing and ongoing case management for citizens who apply to use the exchange without any financial help
- Online applications, intake processing and ongoing case management for citizens who apply for an exemption from the individual mandate which requires them to obtain public or private health insurance for themselves and their dependents
- Online applications, integration with the plan management system, intake processing and ongoing case management for employees who wish to avail of employer-sponsored insurance provided through the Small employer Health Options Programme (SHOP)
- Support for appealing any decisions made by the system and managing the lifecycle of any such appeals
- Support for registering Navigators who will be available to assist citizens with their applications; support for citizens searching for Navigators on a map and creating referrals to them; support for recording which Navigators assisted which citizens and with which functions

# IBM Cúram Child Welfare

## DISPOSITION OF MULTIPLE ALLEGATIONS AT ONCE

In child welfare, children who are potential victims of abuse and/or neglect may be involved in multiple allegations of such abuse and/or neglect. The investigation process requires that each single allegation of abuse and/or neglect towards a child by any individual needs to be validated or "disposed of". The investigation process will need to consider each individual allegation on its own merit, but the process of this investigation and the evidence used to assess the validity and accuracy of the allegations may be the same. The original child welfare application required that the investigator dispose of each allegation one at a time. To support the reality of the investigation and allegation disposition process, the application has been extended to allow the investigator the ability to dispose of multiple allegations at the same time if the data used to evaluate the efficacy of the allegation and the end determination of the allegation's veracity is the same.

## CREATING MULTIPLE ALLEGATIONS FOR MULTIPLE PARTICIPANTS

In child welfare, children who are potential victims of abuse and/or neglect will be involved in multiple allegations of such abuse and/or neglect. In order to support this reality, the original child welfare application allowed the intake worker (during the intake process) to identify more than one allegation of abuse and/or neglect for a single alleged victim and a single alleged provider. This particular limitation has been removed and the application has been extended to provide the ability to capture multiple allegations of abuse and/or neglect for one or more alleged victims involving one or more alleged maltreaters. The identification of multiple allegations for multiple alleged victims involving multiple alleged maltreaters will still result in the creation of a single allegation record per alleged victim, alleged maltreater and allegation type. Each allegation will still need to be assessed for validity on their own merits, but the initial creation of the allegations that a child or children are involved with has been streamlined to provide the ability to quickly capture and record the relevant details of those allegations.

## USER LEVEL SCREENING CASE APPROVAL CHECK FUNCTIONALITY

Previously, an administrator was only able to configure an approval check level for an intake at the intake level, and not the user level. This has been updated to provide the ability to configure an intake's approval check percentage at the user level.

## **IBM Cúram Business Intelligence and Analytics Reports for Child Welfare**

### SUPPORT FOR BUSINESS INTELLIGENCE COMPONENTS FOR THE DB2 PLATFORM

In order to provide support for the data warehouse and analytical charts provided within Curam's Business Intelligence and Analytics component on a DB2 platform, ETL support has now been provided with InfoSphere Warehouse. Please refer to the v6.0.5 prerequisites for further details - <http://www-01.ibm.com/support/docview.wss?uid=swg27036661>

## **IBM Cúram Business Intelligence and Analytics Reports for Income Support**

### SUPPORT FOR BUSINESS INTELLIGENCE COMPONENTS FOR THE DB2 PLATFORM

In order to provide support for the data warehouse and analytical charts provided within Curam's Business Intelligence and Analytics component on a DB2 platform, ETL support has now been provided with InfoSphere Warehouse. Please refer to the v6.0.5 prerequisites for further details - <http://www-01.ibm.com/support/docview.wss?uid=swg27036661>



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