

IBM Cúram Social Program Management



Cúram Universal Access Configuration Guide

Version 6.0.5

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Note

Before using this information and the product it supports, read the information in "Notices" on page 49

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Chapter 1. Introduction

1.1 Purpose

The purpose of this guide is to describe the configuration options available for IBM Cúram Universal Access (UA).

1.2 Audience

This guide is intended for administrators responsible for configuring UA. It is assumed that the administrators have worked with code tables, application properties, and system security as part of Cúram system administration.

1.3 Prerequisites

The Cúram Universal Access Guide is a reading prerequisite.

1.4 Chapters in this Guide

The following list describes the chapters within this guide:

Configuring Triage

This chapter describes the configuration options for the triage script, triage rule set and triage results page.

Configuring Service Areas and PDF Forms

This chapter describes how to configure the service areas which can then be associated with a local office which allows a citizen to identify where they can send applications. The forms that a citizen can use to apply for programs is also included.

Configuring Programs

This chapter describes how to configure programs that can be applied for within applications and screenings. This includes the offices where the program can be applied for the mappings between data captured during an application for a program and associated evidence tables.

Configuring Screenings

This chapter describes how to configure screenings. This includes the programs which can be screened for within a particular screening.

Configuring Applications

This chapter describes how to configure applications. This includes the programs which can be applied for within a particular application.

Configuring Online Categories

This chapter describes how to configure online categories. This includes associating applications and screenings with a particular category.

Configuring the Citizen Account

This chapter describes the configuration options of the citizen account. This includes the configurable elements of the citizen account home page and the contact information tab.

Configuring Life Events

This chapter describes how to configure life events. This includes the creation of categories and the association of life events with categories.

Configuring Multifactor Authentication

This chapter describes how to configure factors which can be used to authenticate users of UA.

Configuring Languages

This chapter describes how to configure the languages that UA is available in.

Configuring Remote Systems

This chapter describes how to configure the remote systems. Remote systems can then be specified for a program or a life event and indicates the external systems which will process the data submitted by a citizen or case worker when applying for a program or submitting a life event.

Configuring Motivations

This chapter describes how to configure the motivations. This includes the configuration of the result page displayed after running a motivation.

Chapter 2. Configuring Triage

2.1 Introduction

The purpose of this chapter is to describe the configuration options available for triage. A triage question script and rule set must be defined in order to produce triage results. Triage results display services that meet a clients needs based on answers provided in the triage script. The number of services to be preselected on the results page can be configured. The providers of services are displayed on Google Maps. The map displayed is governed by a number of settings outlined in this chapter.

2.2 Configuring Triage Script and Rule set

Triage uses an IEG (Intelligent Evidence Gathering) script combined with a CER (Cúram Eligibility Rule set) rule set to derive triage results. The IEG script can be defined in the IEG section of the Cúram Administration Application. The `curam.citizenworkspace.triage.script.id` and `curam.citizenworkspace.triage.datastore.schema` system properties are used to specify the triage script and associated data store schema for UA. The `curam.citizenworkspace.triage.ruleset.name` system property is used to specify the CER rule set to run when triage is performed in UA. For more information on writing rule sets for triage see 2.4, "Writing Rule Sets For Triage," on page 5.

2.3 Configuring Triage Results

This sections outlines the configuration options available for the triage results page. The sections below detail triage configurations.

2.3.1 Configuring Services List

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. The `curam.citizenworkspace.triage.num.services.selected` 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. The default value for this property is 10.

2.3.2 Configuring the Map

A number of configuration options are provided which dictate how the map is displayed when the triage results page is first opened. These include the central point, the zoom level and a geocoding bias.

2.3.2.1 Central Point

In order for the map to display providers specific to an agency's location, a system property is provided which allows the map to be opened displaying a particular area. Two system properties, `curam.citizenworkspace.triage.map.default.center.latitude` and `curam.citizenworkspace.triage.map.default.center.longitude` are provided which dictate the central point at which the map will open.

2.3.2.2 Zoom Level

The initial zoom level of the Google Maps display can be configured using the system property `curam.citizenworkspace.triage.map.default.zoom.level`. Zoom levels between 0 (the lowest zoom level in which the entire world can be seen on one map) to 21+ (where individual buildings can be seen) are possible. The default value for this property is 12.

The zoom level of the map also effects whether icons displayed are useful or not i.e. displaying icons when an entire country is displayed on the map will not help a citizen find an appropriate provider close to them. The system property `curam.citizenworkspace.triage.map.min.zoom.level.display.pins` is provided which dictates the zoom level at which icons will no longer be displayed. This can be set to a value between 0 and +21. For example, if this is set to 0 (world view), icons are displayed at all zoom levels. If it is not set, icons will always be displayed. The default value for this setting is 8. If a citizen zooms to a level that no longer allows icons to be displayed, a message can be displayed to the citizen informing them that they must zoom in to see icons. The `curam.citizenworkspace.triage.map.show.message.min.zoom.passed` system property is provided to dictate if this message is displayed or not i.e. it works in conjunction with `curam.citizenworkspace.triage.map.min.zoom.level.display.pins`. The default value for this property is 'YES'.

2.3.2.3 Geocoding Bias

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. An additional area can be defined known as the geocoding bias which dictates the north/south/east/west boundaries of the map within which providers should be returned i.e any providers whose location is beyond this boundary are not displayed. In the example above, there may be numerous locations called 'Springfield' and so the geocoding bias can be used to dictate the area of the map that should be displayed to a citizen. The geocoding bias can be defined in the Triage section of the UA Administration Application. The administrator can navigate a map to zoom and select a bias area.

2.3.2.4 Caching Provider Information

Provider information is cached to improve performance. A number of configuration settings are provided which relate to the caching of provider information. The cache is an in-memory representation of the configured geocode bias area segmented into a 2-d array. System properties `curam.citizenworkspace.num.provider.cache.rows` and `curam.citizenworkspace.num.provider.cache.cols` determine the number of rows and columns that the array contains.

The system property `curam.citizenworkspace.triage.expire.provider.cache` is used to determine whether the client-side provider cache expires. It is recommended that this is always set to 'YES' so that the provider information displayed matches what is stored on the data base for that provider. Setting this property to 'NO' could result in provider data being out of sync with the providers that are mapped. The system property `curam.citizenworkspace.triage.provider.cache.lifespan` works in conjunction with the `curam.citizenworkspace.triage.expire.provider.cache` property. It is used to determine the period (in minutes) that the provider cache will live for. Once the cache has been populated for this period it is automatically reloaded to ensure that it is consistent with the data on the database. The default for this property is 1440 minutes (60 [minutes]* 24 [hours]).

2.3.2.5 Defining Google Maps License Keys

A license for Google Maps is required in order for the triage map to display. The system property `curam.citizenworkspace.google.map.license.key` is used to store the license key. A free key can be requested on <http://code.google.com/apis/maps/signup.html>.

A security modal is displayed before the triage map is launched because mixed content is displayed i.e. secure (Cúram) information and non secure information (Google Maps) which results in a warning being displayed to the user. To avoid this, a premier account with Google Maps is required and HTTPS must be switched on for this account. Two system properties are provided to store this information. `curam.citizenworkspace.enable.https.google.map` is used to dictate that HTTPS is being used. `curam.citizenworkspace.google.client.id` is used to store the Google Maps client ID (as opposed to the map key stored in `curam.citizenworkspace.google.map.license.key` which is used in the standard HTTP map).

2.3.2.6 Prepopulating The Triage Script

When triage is performed from within the citizen account, information already known about the citizen performing the triage can be pre-populated. The system property `curam.citizenaccount.prepopulate.triage` is provided which dictates whether the IEG script is pre-populated or not. The default value of this property is true which means that the script will be pre-populated with information already known about the citizen.

2.4 Writing Rule Sets For Triage

All triage rule sets will need to use the triage interface so that they can be executed within UA. The interface is detailed below:

```
<?xml version="1.0" encoding="UTF-8"?>
<!--
  Copyright 2010-2011 Curam Software Ltd.
  All rights reserved.

  This software is the confidential and proprietary
  information of Curam Software, Ltd. ("Confidential
  Information"). You shall not disclose such Confidential
  Information and shall use it only in accordance with
  the terms of the license agreement you entered into
  with Curam Software.
-->
<RuleSet
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xsi:noNamespaceSchemaLocation=
    "http://www.curamsoftware.com/CreoleRulesSchema.xsd"
  name="TriageInterfaceRuleSet">

  <!-- This class must be extended by all rule sets invoked by
  the Citizen Portal screening results processing. -->
  <Class name="AbstractTriageResult" abstract="true">

    <Attribute name="alertMessage">
      <type>
        <javaclass name="List">
          <ruleclass name="AbstractAlertMessage"/>
        </javaclass>
      </type>
      <derivation>
        <abstract/>
      </derivation>
    </Attribute>

    <Attribute name="services">
      <type>
        <javaclass name="List">
          <ruleclass name="AbstractService"/>
        </javaclass>
      </type>
      <derivation>
        <abstract/>
      </derivation>
    </Attribute>

    <Attribute name="programs">
      <type>
        <javaclass name="List">
          <ruleclass name="AbstractProgram"/>
        </javaclass>
      </type>
      <derivation>
        <abstract/>
      </derivation>
    </Attribute>
  </Class>
</RuleSet>
```

```

</Attribute>

<Attribute name="screenings">
  <type>
    <javaclass name="List">
      <ruleclass name="AbstractScreening"/>
    </javaclass>
  </type>
  <derivation>
    <abstract/>
  </derivation>
</Attribute>

<Attribute name="intakeApplications">
  <type>
    <javaclass name="List">
      <ruleclass name="AbstractIntakeApplication"/>
    </javaclass>
  </type>
  <derivation>
    <abstract/>
  </derivation>
</Attribute>

<Attribute name="needs">
  <type>
    <javaclass name="List">
      <ruleclass name="AbstractNeed"/>
    </javaclass>
  </type>
  <derivation>
    <abstract/>
  </derivation>
</Attribute>

</Class>

<!-- Abstract Need -->
<Class abstract="true" name="AbstractNeed">
  <Attribute name="description">
    <type>
      <javaclass name="curam.creole.value.Message"/>
    </type>
    <derivation>
      <abstract/>
    </derivation>
  </Attribute>

  <Attribute name="identifier">
    <type>
      <javaclass name="String"/>
    </type>
    <derivation>
      <abstract/>
    </derivation>
  </Attribute>

  <Attribute name="appropriate">
    <type>
      <javaclass name="Boolean"/>
    </type>
    <derivation>
      <abstract/>
    </derivation>
  </Attribute>

  <Attribute name="priority">

```



```

    <type>
      <javaclass name="Number"/>
    </type>
  </derivation>
</Attribute>
</Class>

<!-- Abstract Screening -->
<Class abstract="true" name="AbstractScreening">
  <Attribute name="description">
    <type>
      <javaclass name="curam.creole.value.Message"/>
    </type>
    <derivation>
      <abstract/>
    </derivation>
  </Attribute>

  <Attribute name="appropriate">
    <type>
      <javaclass name="Boolean"/>
    </type>
    <derivation>
      <abstract/>
    </derivation>
  </Attribute>

  <Attribute name="identifier">
    <type>
      <javaclass name="String"/>
    </type>
    <derivation>
      <abstract/>
    </derivation>
  </Attribute>
</Class>
<!-- End Abstract Screening -->

<!-- AbstractIntakeApplication -->
<Class abstract="true" name="AbstractIntakeApplication">
  <Attribute name="description">
    <type>
      <javaclass name="curam.creole.value.Message"/>
    </type>
    <derivation>
      <abstract/>
    </derivation>
  </Attribute>

  <Attribute name="appropriate">
    <type>
      <javaclass name="Boolean"/>
    </type>
    <derivation>
      <abstract/>
    </derivation>
  </Attribute>

  <Attribute name="identifier">
    <type>
      <javaclass name="String"/>
    </type>
    <derivation>
      <abstract/>
    </derivation>
  </Attribute>

```

```

    </Attribute>
</Class>
<!-- End AbstractIntakeApplication -->

<Class name="AbstractAlertMessage" abstract="true">
  <Attribute name="alertRequired">
    <type>
      <javaclass name="Boolean"/>
    </type>
    <derivation>
      <abstract/>
    </derivation>
  </Attribute>
  <Attribute name="message">
    <type>
      <javaclass name="curam.creole.value.Message"/>
    </type>
    <derivation>
      <abstract/>
    </derivation>
  </Attribute>
</Class>

<!-- Abstract Service -->
<Class abstract="true" name="AbstractService">
  <Attribute name="description">
    <type>
      <javaclass name="curam.creole.value.Message"/>
    </type>
    <derivation>
      <abstract/>
    </derivation>
  </Attribute>

  <Attribute name="appropriate">
    <type>
      <javaclass name="Boolean"/>
    </type>
    <derivation>
      <abstract/>
    </derivation>
  </Attribute>

  <Attribute name="identifier">
    <type>
      <javaclass name="String"/>
    </type>
    <derivation>
      <abstract/>
    </derivation>
  </Attribute>

  <Attribute name="groupInd">
    <type>
      <javaclass name="Boolean"/>
    </type>
    <derivation>
      <abstract/>
    </derivation>
  </Attribute>

  <Attribute name="needIdentifier">
    <type>
      <javaclass name="String"/>
    </type>
    <derivation>
      <abstract/>
    </derivation>
  </Attribute>

```

```

        </derivation>
    </Attribute>

</Class>

<!-- Abstract program -->
<Class abstract="true" name="AbstractProgram">
    <Attribute name="description">
        <type>
            <javaclass name="curam.creole.value.Message"/>
        </type>
        <derivation>
            <abstract/>
        </derivation>
    </Attribute>

    <Attribute name="appropriate">
        <type>
            <javaclass name="Boolean"/>
        </type>
        <derivation>
            <abstract/>
        </derivation>
    </Attribute>

    <Attribute name="programTypeReference">
        <type>
            <javaclass name="String"/>
        </type>
        <derivation>
            <abstract/>
        </derivation>
    </Attribute>

    <Attribute name="needIdentifier">
        <type>
            <javaclass name="String"/>
        </type>
        <derivation>
            <abstract/>
        </derivation>
    </Attribute>

</Class>

</RuleSet>

```

The ruleset specified by the `curam.citizenworkspace.triage.ruleset.name` application property must include a rule class, typically named "Triage" which extends the `AbstractTriageResult` rule class outlined above.

This usage of the `AbstractTriageResult` rule class guarantees that the required attributes are available during the rules execution.

Chapter 3. Configuring Service Areas and PDF Forms

3.1 Introduction

This chapter provides an overview of the configuration options available to configure service areas and PDF forms. Service areas represent a region covered by the counties and/or zip codes that have been associated with the service area. A PDF Form is a form which can be used by a citizen to apply for program(s).

3.2 Configuring Service Areas

Service areas are defined in the Service Areas section of the UA Administration Application. When defining a service area a name must be specified, for example, Washington. Once the service area is created, counties and zip codes can then be associated with the service area. These counties and zip codes represent the areas covered by the service area. Once defined, service areas can be associated with a local office which represents the office that services the service areas associated with it. Local offices are used to identify where a citizen can apply in person for a particular program and/or where they can send a particular application. For more information on associating service areas with local offices where a citizen can apply in person for a program see 4.3, "Defining Local Offices For A Program," on page 17. For more information on associating a service area with a local office where a citizen can send an application see 3.3.1, "Associating a Local Office with a PDF Form."

3.3 Configuring PDF Forms

PDF Forms are defined in the PDF Forms section of the UA Administration Application. When defining a PDF Form a name, PDF Form and language must be specified. The agency can add a version of the form for each language (locale) configured for UA. Once defined, these forms are accessible from the Print and Mail Form page of UA.

3.3.1 Associating a Local Office with a PDF Form

A local office can be associated with a PDF Form. Associating a local office with a PDF Form allows an administrator to define the local office and associated service areas where a citizen should send their completed application to.

3.4 Searching For A Local Office

A search page is provided in UA which allows a citizen to search for a local office where they can send an application to or apply in person. The citizen can either search by county or by zip code. The system property `curam.citizenworkspace.page.location.search.type` is provided which dictates which of these options is made available to a citizen. If this property is set to 'Zip' the citizen will be able to search for a local office using a zip code. If this property is set to 'County' the citizen will be able to select from a list of counties in order to return a list of local offices.

Chapter 4. Configuring Programs

4.1 Introduction

This chapter provides an overview of the configurations available for defining programs in UA. UA allows agencies to define different types of programs. Once programs have been defined, they can be associated with screenings and applications which allow clients to screen and apply for these programs via UA. There are three main aspects to configuring a program:

- Configuring programs and associated display and system processing information
- Configuring local offices where an application for a program can be mailed to
- Configuring mappings which allow information gathered during application intake to be mapped to a PDF form
- Configuring evidence types which allows for expedited authorization of programs which may need to be processed before other programs within a multi program application

This chapter outlines these aspects in more detail.

4.2 Configuring a New Program

Programs are configured on the New Program page. The sections below detail program configurations.

4.2.1 Defining a Name and Reference

A name and reference must be defined when creating a new program. The name defined will be displayed to the citizen in UA and in the internal application. The reference is used to reference the program in code.

4.2.2 Defining an Intake Processing System

An intake processing system must be specified for each program. If a case processing system is not specified, the system will not be able to respond to the submission of an application for that program. There are two options available: 'Cúram' or select from pre-configured remote systems. Select 'Cúram' if intake is managed by a Cúram based system. Select a remote system if intake is managed by a non-Cúram based system(the program application will then be sent to the remote system using the ProcessApplicationService web service).

If Cúram is specified as the intake system, an application case type must be selected. An application case of the specified type is created in response to a submission of an application for the program. An indicator is provided which dictates whether a Reopen action will be enabled on the programs list on an application case for denied and withdrawn programs of a particular type. A workflow can be specified which will be initiated when the program is reopened. For more information on configuring application cases see the Cúram Intake Configuration Guide.

A remote system must be configured in the administration application before it can be selected as the case processing system. For more information on remote systems see the Configuring Remote Systems chapter of this guide.

4.2.3 Defining Case Processing Details

A case processing system must be specified for each program. There are two options available; 'Cúram' or select from pre-configured remote systems. Select 'Cúram' if the program eligibility is determined and managed using a Cúram based system. Select a remote system if eligibility is determined and managed by a non-Cúram based system.

If Cúram is selected as the case processing system, additional options are available to allow for program level authorization to be configured. Program level authorization means that if an application case contains multiple programs, each program can be authorized individually and a separate integrated case is used to manage the clients ongoing case. The following options are available.

4.2.4 Defining the Integrated Case Strategy

The Integrated Case Strategy must be defined in order for the system to identify whether a new or existing integrated case should be used when program authorization is successful. The integrated case is used to host any product deliveries created as a result of the authorization. If a new integrated case is created, all of the application case clients are added as case participants to the integrated case. If an existing integrated case is used, any additional clients on the application case are added as case participants to the integrated case. Any evidence captured on the application case that is also required on the integrated case is copied to the integrated case upon successful authorization. The configuration options for the integrated case strategy are as follows:

New A new integrated case of the specified type is always created when authorization of the program is successful.

Existing (Exact Client Match)

If an integrated case of the specified type exists with the same clients as those present on the application case, the existing case is automatically used. If multiple integrated cases that meet these criteria exist, the worker is presented with a list of the cases and must select one to proceed with the authorization. If no existing cases match the criteria, a new integrated case is created.

Existing (Exact Client Match) or New

If one or more integrated cases of the specified type exist with the same clients as those present on the application case, the user is presented with the option to select an existing case to use as the ongoing case, or to create a new integrated case. If no existing cases match the criteria, a new integrated case is created.

Existing (Any Client Match) or New

If one or more integrated cases of the specified type exist, where any of the clients of the application case are case participants, the user is presented with the option to select one of the existing cases to use as the ongoing case, or to create a new integrated case. If no existing cases match the criteria, a new integrated case is created.

4.2.5 Specifying the Integrated Case Type

The administrator must specify the type of integrated case to be created/used upon successful program authorization as defined by the Integrated Case strategy above.

4.2.6 Specifying a Client Selection Strategy

The Client Selection Strategy is used to define how clients are added from the application case to the product delivery created as a result of authorization of a program. If a product delivery type is specified, a client selection strategy must be selected. The configuration options are as follows:

All Clients

All of the application clients are added to the product delivery case. The application case primary client is set as the product delivery primary client. All other clients are added to the product delivery as members of the case members group.

Rules A rule set is used to determine the clients to be added to the product delivery(if a product delivery is configured). At least one client must be determined by the rules for authorization to proceed.

User Selection

The user selects the clients who should be added to the product delivery. The user must select both the primary client and any other clients to be added to the case member group on the product delivery.

4.2.7 Specifying a Client Selection Ruleset

A Client Selection Ruleset must be selected when the Client Selection Strategy is 'Rules'.

4.2.8 Specifying a Product Delivery Type

The Product Delivery Type is used to specify the product delivery used to make a payment to a client(s) in respect of a program. The drop down displays all active products configured on the system.

Note: This field applies to both program and application authorization processing i.e. Program and application authorization can result in the creation of the product delivery type specified.

4.2.9 Submitting a Product Delivery Automatically

The Submit Product Delivery indicator is used to dictate if the product delivery created as a result of program authorization should be submitted automatically for approval. If selected, the product delivery created as a result of authorization of this program is submitted automatically for a supervisor for approval.

Note: This field applies to both program and application authorization processing i.e. Program and application authorization can result in the automatic submission of a product delivery.

4.2.10 Configuring Timers

Many organizations impose time limits within which an application for a program must be processed. For example, a government agency may have a requirement that food assistance applications must be authorized within 30 business days of the date of application. Cúram provides organizations with the ability to configure application timers for each program. 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. All configuration options are outlined below.

Duration

The length of the timer in days. This value, along with the fields 'Start Date' and 'Use Business Days' (and the configured business hours for the organization) will be used to calculate the expiry date for the timer. This value will be used as a number of business days if 'Use Business Days' is set. If 'Use Business Days' is not set this value will be used as calendar days.

Start Date

Specifies whether the timer should start on the application date or the program addition date. The options available are 'Application Date' and 'Program Addition Date'. Note that in most cases these dates will be the same (the programs will be added at the same time as the application is made) but when a program is subsequently added to the application, after initial submission, this may not be the case.

Warning Days

Allows for the specification of a number of warning days. The warning days are used to warn the user that the timer deadline is approaching. If configured, the Warning Reached workflow will also be enacted when the warning date is reached and the timer is still running (i.e. the program has not been completed).

End Date Extension Allowed

An indicator to dictate if a user can extend the timer by a number of days.

Extension Approval Required

An indicator to dictate if a timer extension requires approval from a supervisor. If approval is required for the extension, the case supervisor must review and either approve or reject the extension. Once the extension is approved, or if approval is not required, the timer expiry date is updated to reflect the extension.

Use Business Days

An indicator to dictate that the timer should not decrement over non-working days. If this is set,

the system uses the Working Pattern Hours for the organization to determine the non-working days when calculating the expiry date for the timer.

Resume Timer

An indicator to dictate whether the program timer should be resumed when the program is reopened.

Resume From

If a timer is resumed the Resume From field dictates the dates from which a program can be resumed. The values include the date the program was completed (denied or withdrawn), and the date that the program was reopened.

Timer Start

Allows for the specification of a workflow that is enacted when the timer starts.

Warning Reached

Allows for the specification of a workflow that is enacted when the warning period is reached.

Deadline Not Achieved

Allows for the specification of a workflow that is enacted if the timer deadline is not achieved i.e. the program has not been withdrawn, denied or approved by the timer expiry date.

4.2.11 Configuring Multiple Applications

The Multiple Applications indicator dictates if a citizen can apply for this program while they have a previous application pending. If set to true, the citizen can have multiple pending applications for the given program i.e. they can submit an application for this program while they already have a pending application in the system. If it is set to false, this program will not be offered for application in UA if the currently logged in citizen has pending applications for this program.

4.2.12 Defining A PDF Form

Defining a PDF form for a program enables a citizen to print an application for the specified program and either post it to the agency or bring it in person to a local office. When a PDF Form is specified for a program the PDF form will be displayed on the Print Out and Mail section of the Your Next Step page displayed when a citizen has completed a screening. PDF Forms must be defined before they can be associated with a program. Once defined they will be displayed on the Print & Mail Application Form page accessible from UA. For more information on defining PDF Forms see Chapter 3 Configuring Service Areas and PDF Forms.

4.2.13 Defining a URL

If a URL is defined, a 'More Info' link is displayed beside the program name in UA allowing a citizen to find out more information about the selected program.

4.2.14 Defining Description and Summary Information

When a program is displayed to a citizen on the Select Programs page in UA, a description can be displayed which gives a description of the program. The Online Program Description field allows for the definition of this description.

A description summary of the program can also be defined using the Online Program Summary field. This is a high level description of the program displayed on the 'Your Next Steps' page displayed when a citizen has completed a screening.

4.2.15 Defining Local Office Application Details

It may be possible for a program to be applied for at a local office. If this is the case, the Citizen Can Apply At Local Office indicator can be used to dictate that local office information is displayed in UA for a particular program. Additional information can also be defined, for example, a citizen may need to

bring proof of identity if the citizen wants to apply at the local office. An administrator can define this information in the Local Office Application Information field.

4.3 Defining Local Offices For A Program

A citizen may be able to apply for a program in person at a local office. A local office must be first defined in the LocalOffice code table in system administration. Associating a local office with a program allows an administrator to define the local offices and their associated service areas where a particular program can be applied for in person. This information is displayed to a citizen on the Your Next Step page which is displayed to a citizen when they have performed a screening. Note: Service areas must be defined before they can be associated with a local office. For more information on defining service areas see Chapter 2 Configuring Service Areas and PDF Forms.

4.4 Defining PDF Mappings For A Program

The information entered during an online application can be mapped to a PDF Form which can be subsequently printed by the citizen. In order for the application data to be mapped to the PDF Form for all programs a citizen is applying for, a mapping configuration of type PDF Form Creation must exist for each of the programs. Note: this PDF Form is the form specified for the Online Application the program is associated with. For more information on this PDF Form see Section 6.5 Defining A PDF Form.

4.5 Defining Program Evidence Types

Evidence Types can be associated with a program. This can be used by an organization to provide support for applications for multiple programs where a particular program needs to be authorized much more quickly than other programs for which the client may have applied, for example, expedited food assistance. Using this type of configuration, only the evidence required for the program to be authorized will be used and copied to the ongoing cases. This allows benefits for the authorized program to be delivered to the client, while the worker continues to gather the evidence required for the other programs applied for.

Chapter 5. Configuring Screenings

5.1 Introduction

This chapter provides an overview of the configurations available for defining screenings in UA administration. UA administration allows an agency to define different types of screenings. Once defined, a citizen can perform a screening to identify programs that they may be eligible to receive. There are four main aspects to configuring a screening:

- configuring information about a screening to be displayed to a citizen in UA
- configuring the script, rules and schema used to collect and process the information specified by a citizen to identify their eligibility
- configuring the programs for which a citizen can check their eligibility when performing a screening
- configuring additional screening system properties

This chapter outlines these aspects in more detail.

5.2 Configuring A New Screening

Screenings are configured on the New Screening page. The sections below detail screening configurations.

5.2.1 Defining A Name

A name must be defined when creating a new online screening. The name defined is the name of the screening displayed to a citizen in the UA portal.

5.2.2 Defining Program Selection

The Program Selection indicator dictates whether a citizen or user will be provided with the ability to select specific programs that they would like to screen for or whether they will be brought directly into a screening script i.e. they will be screened for all programs associated with the screening.

5.2.3 Defining a More Info URL

If a More Info URL is defined, a 'More Info' link is displayed beside the name of the screening in UA allowing a citizen to find out more information about the selected screening.

5.3 Configuring Eligibility and Screening Details

Two types of screening are supported by UA - filtered screening and eligibility screening. Eligibility screening involves collecting answers to a set of questions, storing this information and processing it to identify eligibility. Filtered screening is used to reduce the number of programs for which a citizen can screen. The objective is to reduce the number of programs that a citizen might screen for by asking a short set of questions and using the answers to filter out the programs that they would not be eligible for.

This section outlines how eligibility and filtered screening is configured.

5.3.1 Configuring Eligibility Screening Details

An IEG script must be specified for the screening which is used to collect the answers to a set of questions. A data store schema must also be specified to store the data entered in the script. On saving the screening, an empty template for both the script and schema will be created by the system based on the Question Script and Schema specified. It will then be possible to update these from the Screening tab by selecting hyperlinks provided on the page. Clicking on the Question Script link will launch the IEG

Editor which will allow the question script to be edited. Clicking on the Schema link will launch the Datastore Editor which will allow the schema to be edited.

To process the data in the data store and to produce an eligibility result, a CER rule set must be specified. Once specified on creation of the screening, an empty rules template will be created by the system. It will then be possible to update the ruleset from the Screenings tab by selecting the hyperlink provided on the page. Clicking on the link will launch the CER Editor which will allow the ruleset to be edited. For more information on writing screening rule sets, see 5.9, “Writing Rule Sets For Screening,” on page 21

For more information on using the CER Editor see the Working With CER Guide . For more information on the IEG Editor see the Working With Curam Intelligent Evidence Gathering guide.

5.3.2 Configuring Filtered Screening Details

In order for filtered screening to be available before performing eligibility screening, filtered screening details must be specified for a screening. As with eligibility screening, a Filter Script (IEG) and associated data store schema must be defined to collect and store the answers to questions, and Filter Rules (CER rule set) must be specified to process the data and produce a filtered screening result. Once specified on the New Online Screening page, the system will automatically create an empty template for the scripts and ruleset which can be subsequently updated by selecting the associated hyperlinks on the Screening page.

5.3.3 Reusing Rule Sets Across Screenings

A system property is provided which dictates whether CER rule sets can be reused across different screenings and also whether the same rule set can be used for eligibility and filtered screening. The system property `curam.citizenworkspace.screening.ruleset.reuse.enabled` can be used to control this. If this property is switched on, rule sets can be reused. If it is switched off, rule sets cannot be reused. Note: the `ScreeningRulesLinkDAO.readActiveByRuleSet` method cannot be used when this property is enabled.

5.4 Configuring Screening Display Information

Four pieces of information can be configured for each screening which is displayed in UA. A Summary, Description, Am I Eligible Text and How To Apply text can be defined.

5.4.1 Summary Information

Summary information allows an administrator to define a high level description of the screening.

5.4.2 Am I Eligible Text

Am I Eligible Text allows an administrator to define the text to be displayed on the Am I Eligible page in UA which is displayed to show a citizen the results of a completed screening.

5.4.3 Description

Descriptions allow an administrator to define a description of the screening to be displayed in UA.

5.4.4 How To Apply Text

How To Apply Text allows an administrator to define the text displayed on the Your Next Step page in UA.

5.5 Defining Programs For A Screening

In order to screen for particular programs, programs must be associated with the screening. Any program, as described in Chapter 4 Configuring Programs, can be associated with a screening. When associating programs with a screening, an order can be assigned which dictates the display order of the selected program relative to other programs associated with the screening.

5.6 Configuring Authenticated Screening

The agency can configure the system to specify whether, before screening, a citizen can choose to be authenticated or not. The system property `curam.citizenworkspace.authenticated.screening` is used to dictate if authentication is switched on or not. If this property is switched on, a citizen will be given the option to login to UA before starting a screening. If this is switched off, the citizen will be taken directly to the screening selection page.

5.7 Displaying A Confirmation Page On Quit

The agency may wish to display a confirmation page to a citizen when they choose to quit a screening. The system property `curam.citizenworkspace.display.confirm.quit.screening` can be used to dictate if a confirmation page is displayed or not. If this property is switched on a confirmation page will be displayed to a citizen when quit is selected while performing a screening. If this property is switched off a confirmation page is not displayed when a citizen selects to quit a screening.

5.8 Prepopulating The Screening Script

When screening is performed from within the citizen account, information already known about the citizen performing the screening can be pre-populated. The system property `curam.citizenaccount.prepopulate.screening` is provided which dictates whether the IEG script is pre-populated or not. The default value of this property is true which means that the script will be pre-populated with information already known about the citizen.

5.9 Writing Rule Sets For Screening

This section describes how to develop screening rule sets. It begins by outlining the type of data store schema required for developing effective screening rule sets.

5.9.1 How to Add a Datastore Schema for Use in Screening

Developers are free to create new data store schema for use with their Universal Access screening and intake IEG2 scripts. There are, however, some constraints on the format of these schema. In some cases, requirements dictate that clients can screen for a program and then follow that screening with an application for benefits. In many cases such applications will be processed by Cúram and mapped to Cúram cases and evidence using the Cúram Data Mapping Engine (CDME). In these circumstances, it is advisable to use the `CitizenPortal.xsd` as a basis for the schema for screening, this is because the same data store schema must also be used for intake. In particular, the CDME features will not work correctly if schema are used that remove or change the data type of any of the attributes or entities in the `CitizenPortal.xsd` schema.

All schema that follow the pattern of the `CitizenPortal.xsd` schema are guaranteed to be safe for future upgrades; i.e., later releases. This means that upgrades will not add any new mandatory attributes or entities or change any existing attributes or entities that are currently required to support existing Cúram data mapping engine functionality.

5.9.2 The Screening Rules Interface

Please note that all screening rule sets will need to use the screening rules interface so that they can be executed within Universal Access. The interface is detailed below:

```
<?xml version="1.0" encoding="UTF-8"?>

<RuleSet xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xsi:noNamespaceSchemaLocation="http://www.curamssoftware.com/
  CreoleRulesSchema.xsd"
  name="ScreeningInterfaceRuleSet">
```

```
  <!-- This class must be extended by all rule sets invoked by
```

```

    the Citizen Portal screening results processing. -->
<Class name="AbstractScreeningResult" abstract="true">

  <Initialization>
    <Attribute name="calculationDate">
      <type>
        <javaclass name="curam.util.type.Date"/>
      </type>
    </Attribute>
  </Initialization>

  <!-- The programs supported by this Screening Ruleset. -->
  <Attribute name="programs">
    <type>
      <javaclass name="List">
        <ruleclass name="AbstractProgram"/>
      </javaclass>
    </type>

    <derivation>
      <!-- Subclasses of AbstractScreeningResult must override
           this attribute to create a list of the Programs
           supported by the rule set. -->
      <abstract/>
    </derivation>
  </Attribute>

</Class>

<!-- This class must be extended by all programs supported
     in the rule set. -->
<Class name="AbstractProgram" abstract="true">

  <!-- Identifies the program as configured in the Citizen
       Portal administration application. -->
  <Attribute name="programTypeReference">
    <type>
      <javaclass name="String"/>
    </type>
    <derivation>
      <abstract/>
    </derivation>
  </Attribute>

  <!-- Whether the claimant is eligible for this program. -->
  <Attribute name="eligible">
    <type>
      <javaclass name="Boolean"/>
    </type>
    <derivation>
      <abstract/>
    </derivation>
  </Attribute>

  <!-- The localizable explanation as to why the claimant is
       or is not eligible for this program. May contain HTML
       formatting/hyperlinks/etc. -->
  <Attribute name="explanation">
    <type>
      <javaclass name="curam.creole.value.Message"/>
    </type>
    <derivation>
      <abstract/>
    </derivation>
  </Attribute>

```



```
    </Attribute>  
  </Class>  
</RuleSet>
```

Screening rule sets must include a class that extends the `AbstractScreeningResult` rule class outlined above.

This usage of the `AbstractTriageResult` rule class guarantees that the required attributes are available during the rules execution.

Chapter 6. Configuring Applications

6.1 Introduction

This chapter provides an overview of the configurations available for defining applications in UA administration. UA administration allows an agency to define different types of applications. Once defined, a citizen can submit an application for programs to the agency.

There are four main aspects to configuring an application:

- configuring information about an application and associated display information
- configuring the script and schema used to collect and store the information specified during the application process
- configuring the programs for which an application can be used to apply
- configuring reasons that can be selected if a citizen withdraws an application
- configuring additional application system properties

This chapter outlines these aspects in more detail.

6.2 Configuring A New Application

Applications are configured on the New Application page. The sections below detail application configurations.

6.2.1 Defining A Name

A name must be defined when creating a new application. The name defined is the name of the application displayed to a citizen in the online portal.

6.2.2 Defining Program Selection

The Program Selection indicator dictates whether a citizen or user will be provided with the ability to select specific programs that they would like to apply for or whether they will be brought directly into an application script i.e. they will apply for all programs associated with the application.

6.2.3 Defining a URL

If a URL is defined, a 'More Info' link is displayed beside the name of the application in UA allowing a citizen to find out more information about the selected application.

6.2.4 Configuring Summary Information

Summary information allows an administrator to define a high level description of the application to be displayed in UA.

6.2.5 Configuring Description Information

Descriptions allow an administrator to define a description of the application to be displayed in UA.

6.3 Configuring An Application Script

An IEG script must be defined for the application which is used to collect the answers to the application questions. A script name must be specified in the Question Script field. A data store schema must be specified to store the data entered in the script. A schema name must be specified in the Schema field. On saving the application, an empty template for both the script and schema will be created by the system

based on the Question Script and Schema specified. It will then be possible to update these from the Application tab by selecting hyperlinks provided on the page. Clicking on the Question Script link will launch the IEG Editor which will allow the question script to be edited. Clicking on the Schema link will launch the Datastore Editor which will allow the schema to be edited.

6.4 Configuring A Submission Script

A submission script can be defined for an application in order to submit an application to the agency. This is used to define additional information which does not form part of the application script to be captured, for example, a TANF typically requires information regarding the citizen's ability to attend an interview.

A submission script (IEG) can be specified in the Submission Script field. On saving the application, an empty template for both the submission script and will be created by the system based on the Submission Script specified. It will then be possible to update this from the Application tab by selecting the hyperlink provided on the page. Clicking on the link will launch the IEG Editor which will allow the question script to be edited.

6.5 Defining A PDF Form

Defining a PDF form for an application identifies the agency designed form that is displayed to a citizen when an online application is completed. The data collected during the online application copied by the system into this PDF allowing a citizen to print it off. The PDF Form can be selected from the PDF Forms drop down. If a PDF Form is not specified for an application, a default generic PDF Form can be used. This default template is accessible in the XSL Templates section of the Cúram System Administration Application.

The data passed to the XSL Template reads directly from the data store. Rather than displaying the datastore labels in the PDF(which is not user friendly) a property file can be defined which can be used to specify user friendly names for entities and attributes and to hide entities and attributes which should not be displayed in the PDF. This property file must be then uploaded to Application Resources in the Intelligent Evidence Gathering section of the administration application.

The name of the property file needs to be as follows:<application schema name>PDFProps. The contents of the property file should follow these guidelines:

To Name an Entity

<Entity Name=<Name To Be Displayed in the PDF>, for example, Application=Intake Application

To Hide an Entity

<Entity Name.hidden=true, for example, ScreeningType.hidden=true

To Hide an Attribute

<Entity Name.Attribute Name.hidden=true, for example, Application.userName.hidden=true

To Specify a Label For an Attribute

<Entity Name.Attribute Name=PDF Label, for example, Submission.sigFirstName=First Name

For more information on defining PDF Forms see Chapter 3 Configuring Service Areas and PDF Forms.

6.6 Configuring Submission Confirmation Page Details

Additional information can be configured such that it is displayed on the Submission Confirmation page which is displayed when a citizen submits an online application. The Title and Text fields can be used to define a title and text to be displayed on the confirmation page.

6.7 Associating Programs With Applications

In order to apply for particular programs, programs must be associated with the application. Any program, as described in Chapter 4 Configuring Programs can be associated with an application. When associating programs with an application, an order can be assigned which dictates the display order of the selected program relative to other programs associated with the application.

6.8 Defining Mappings For An Application

As mentioned earlier an application can be processed by a Cúram based system or a remote system. If the application is processed by a Cúram based system the information entered in an application is mapped to the evidence tables associated with the application case defined for the programs associated with the application. The mappings are configured for an application by creating a mapping using the Cúram Data Mapping Editor. A mapping configuration must be specified in order for the appropriate evidence entities to be created and populated in response to an online application submission.

For more information on the Cúram Data Mapping Editor see the Cúram Data Mapping Editor Guide.

6.9 Configuring Withdrawal Reasons

A citizen may withdraw the application for all or any one of the programs for which the citizen has applied. When withdrawing an application, a withdrawal reason must be specified. Withdrawal reasons can be defined for a particular application in the Intake Application section of the UA Administration Application. Before associating a withdrawal reason with an application, withdrawal reasons must be defined in the WithdrawalRequestReason code table.

6.10 Mandating Authentication Before Applying

The agency can configure the system to specify whether, before starting an application, a citizen must create an account or login to make an application. The system property `curam.citizenworkspace.authenticated.intake` is used to dictate if authentication is switched on or not. If this property is switched on, a citizen must create an account or login to UA before starting an application. If this is switched off, the citizen will be taken directly to the application selection page.

6.11 Optional Authenticated Application

The agency can configure the system to specify whether, before applying, a citizen can choose to be authenticated or not. The system property `curam.citizenworkspace.intake.allow.login` is used to dictate if authentication is switched on or not. If this property is switched on, a citizen will be given the option to login to UA before starting an application. If this is switched off, the citizen will be taken directly to the application selection page.

6.12 Displaying A Confirmation Page On Quit

The agency may wish to display a confirmation page to a citizen when they choose to quit the application process. The system property `curam.citizenworkspace.display.confirm.quit.intake` can be used to dictate if a confirmation page is displayed or not. If this property is switched on, a confirmation page will be displayed to a citizen when quit is selected while making an application. If this property is switched off, a confirmation page is not displayed when a citizen selects to quit an application. This property is only used when the property `curam.citizenworkspace.intake.allow.login` is set to 'NO'.

6.13 Mandating Authentication Before Submission

The agency may wish to mandate that a citizen logs in before they submit an application. The system property `curam.citizenworkspace.intake.submit.intake.mandatory.login` can be used to dictate that a citizen logs in before they submit an application. If this property is switched on, a citizen must create an account or login before they can submit an application. If this is switched off, the citizen can submit an application without logging in.

6.14 Enabling Applications Link

The system property `curam.citizenworkspace.intake.enabled` can be used to dictate if a citizen can start the application process from the UA Home page. If this indicator is switched on, the applications (Apply For Benefits) link is displayed on the UA Home page. If this is switched off the applications link is not displayed on the UA Home page.

6.15 Prepopulating The Application Script

When a citizen is making an application from within the citizen account, information already known about the citizen performing the application can be pre-populated. The system property `curam.citizenaccount.prepopulate.intake` is provided which dictates whether the IEG script is pre-populated or not. The default value of this property is true which means that the script will be pre-populated with information already known about the citizen.

Chapter 7. Configuring Online Categories

7.1 Introduction

This chapter provides an overview of the configurations available for defining online categories in UA administration. UA administration allows an agency to define different types of online categories. Online categories allow an agency to group different types of applications and different types of screenings together to make it easier for a citizen to identify the application/screening they need. Online categories must be defined in order to allow screenings and applications to be displayed in UA. There are two main aspects to configuring online categories:

- Configuring the online category
- Associating screenings and applications with the online category

7.2 Configuring Online Categories

When defining an online category a name must be specified. A URL can also be defined and if a URL is defined a 'More Info' link is displayed beside the name of the online category in UA allowing a citizen to find out more information about the selected category. An order can be assigned to a category which dictates the display order in UA of the selected category relative to other categories.

7.3 Associating Screenings And Applications

Screenings and applications must be associated with an online category in order for them to be displayed in UA. When associating a screening with an online category, an order can be applied which dictates the display order in UA of the screening relative to other screenings within the same category. When associating an application with an online category an order can be applied which dictates the display order in UA of the application relative to other applications within the same category.

Chapter 8. Configuring The Citizen Account

8.1 Introduction

This chapter provides an overview of the configuration options available in the citizen account. Although customization is required in some areas, there are aspects which will allow an administrator to dictate what gets displayed in the citizen account. There are two main aspects of configurability in the citizen account:

- Configuring information to be displayed on the citizen account home page
- Configuring the information displayed on the contact information tab

Messages can originate as a result of transactions in a Cúram system or a remote system. The majority of the configuration options apply to all messages but there are a number of configuration options which do not apply to messages originating from a remote system. These are highlighted in the sections below.

8.2 Configuring The Citizen Account Home Page

Many aspects of the citizen account page home page are configurable:

- the text displayed in the participant messages in the messages panel
- system messages displayed in the message panel
- the display order of the messages displayed in the messages panel
- the campaigns displayed in the Outreach panel
- the welcome message displayed to a citizen

This section outlines the citizen account configuration options in more detail.

8.2.1 Configuring Messages

The 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 can be displayed as a result of transactions in a Cúram system or they can originate from remote systems via a web service.

This section outlines the aspects of the messages panel which are configurable.

8.2.1.1 Account Messages

Adding a new message or changing a dynamic element of an existing Cúram message requires customization, however, the text defined for existing messages provided out of the box can be updated by using the following properties which exist for each type of message:

- `CitizenMessageMyPayments` - contains the messages relating to payments
- `CitizenMessageApplicationAcknowledgement` - contains the messages relating to application acknowledgements
- `CitizenMessageVerificationMessages` - contains the messages relating to verification messages
- `CitizenMessageMeetingMessages` - contains the messages relating to meetings
- `CitizenMessagesReferral.properties` - contains the messages relating to referrals
- `CitizenMessagesServiceDelivery` - contains the messages relating to service deliveries

All of these property files are stored in the Applications Resources section of the Administration Application. To update the message, each file needs to be downloaded, updated as appropriate and uploaded again. The icons displayed in the citizen account for each type of message can be configured in the Account Messages section of the administration application.

Adding a new message which originates from a remote system requires that a code table entry be added to the ParticipantMessageType codetable and an associated entry in the Account Messages listing in the administration application. Messages can then be sent via the ExternalCitizenMessageWS web service.

For more information on customizing messages see the Cúram Universal Access Customization Guide.

8.2.1.2 System Messages

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 provide information and help line numbers to citizens who have been affected by a natural disaster e.g. floods, hurricanes or earthquakes. System messages can be configured in the UA Administration Application using the New System Message page.

The Title and Message fields allow an administrator to define the title of the message and the message body that will be displayed to a citizen in the My Messages panel. The message can be defined as a priority using the Priority field which means that the message will appear at the top of the messages listing. Note: if there are multiple priority messages the effective date of the message and the message type will be used to dictate the order. See 8.2.1.3, "Ordering and Enabling/Disabling Messages" below. The Effective Date and Time field allows an administrator to define an effective date for the message i.e. when the message will be displayed in the citizen account. The Expiry Date and Time field allows an administrator to define an expiry date for the message i.e. when the message will no longer be displayed in the citizen account.

When the message is initially saved, it has a status of In-Edit. Before the message will be displayed in the citizen account, it must be published. Once published the message is active and will be displayed in the citizen account based on the effective and expiry dates defined.

8.2.1.3 Ordering and Enabling/Disabling Messages

Messages can be ordered by type such that messages of a particular type are displayed first, for example, all payments messages can be configured to display before meeting message types. The Account Messages section allows an administrator to order messages by type. Ordering of messages within a particular type works in conjunction with the priority assigned to messages as well as the effective date of messages i.e. if payment message types are configured to display first in the messages listing, priority messages within this type are displayed first. The effective date is subsequently used to dictate the ordering of the remaining messages. If there are multiple priority messages within a particular type, the effective date is used to dictate the order of the messages.

Types of messages (meetings, payments, system message and so on) can be enabled and disabled. The Account Messages section of the UA administration application provides a list of all message types and allows an administrator to enable/disable messages of a particular type and to define the icons to appear in the citizen account for each message type. Enabling messages of a particular type means that all messages of that type are displayed in the citizen account e.g. all meetings messages (invitations, updates and cancellations) will be displayed in the citizen account. Disabling messages of a particular type means that all messages of that type are not displayed in the citizen account e.g. all meeting messages (invitations, updates and cancellations) will not be displayed in the citizen account.

8.2.1.4 Configuring The Duration Of Messages

System properties are provided which dictate the length of time a type of message will be displayed in the citizen account, for example, a payment message can be configured to be displayed for 10 days in the citizen account. These configuration options only apply to messages originating as a result of transactions on a Cúram system. The following system properties are provided:

- `curam.citizenaccount.payment.message.expiry.days` - this property allows an administrator to dictate the number of days from the effective date that a payment message should be displayed in the citizen account. A payment message will be displayed for this duration unless another payment message is created which should replace it. The default value is 10.
- `curam.citizenaccount.intake.application.acknowledgement.message.expiry.days` - this property allows an administrator to dictate the number of days from the effective date that an application acknowledgement message should be displayed in the citizen account. An acknowledgement message will be displayed for this duration unless another acknowledgement message is created which should replace it. The default value is 10.
- `curam.citizenaccount.meeting.message.effective.days` - this property allows an administrator to dictate the number of days from the effective date that a meeting message should be displayed in the citizen account. A meeting message will be displayed for this duration unless another meeting message is created which should replace it. The default value is 10.

8.2.1.5 Switching Off Messages

An agency may not wish to display messages to a citizen in the citizen account. To cater for this, the system property `curam.citizenaccount.generate.messages` is provided which enables an agency to switch all messages on and off. The default value is true which means that messages will be generated and displayed in the citizen account.

8.2.2 Configuring Outreach

Outreach allows 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. Outreach campaigns can be configured in the Outreach section of the UA Administration Application. Outreach campaigns use CER rule sets to dictate whether a campaign should be displayed or not and as such the appropriate rule set should be created before creating the campaign in the Rules and Evidence section of the Cúram Administration Application. A new outreach campaign can be defined in the New Outreach Campaign page.

A name must be specified which uniquely identifies the campaign in the administration application.

An expiry date can be defined which dictates when the campaign ends i.e. the campaign will no longer be displayed to a citizen when the expiry date is effective.

A CER rule set must be specified. This rule set will dictate whether the campaign is appropriate to a particular citizen.

An image can be displayed in the outreach panel on the citizen account home page. This image can be specified along with the image alt text which will be displayed in the tool tip displayed when a citizen hovers over the image. The images can also allow a citizen to link to a website. This link is defined in the CER rule set associated with the campaign.

For more information on creating outreach campaign rule sets see the Cúram Universal Access Customization Guide.

8.2.3 Configuring Last Logged In Information

The text displayed in the welcome message and last logged on information can be updated using the following properties stored in the `CitizenAccountHome` properties file stored in the Application Resource section of the Cúram Administration Application. The following properties are provided:

- `citizenaccount.welcome.caption` - allows the welcome message to be updated.
- `citizenaccount.lastloggedon.caption` - allows the last logged on text to be updated.
- `citizenaccount.lastloggedon.date.time.text` - allows the date time text to be updated.

8.3 Configuring Contact Information

Contact Information displayed in the citizen account displays contact details (phone numbers, addresses and email addresses) stored for the logged in citizen in Cúram and also case worker contact details(business phone number, mobile phone number, pager, fax and email) of the case owners of cases associated with the logged in citizen in a Cúram system and on remote systems.

This section outlines the configuration options available for each type of contact information.

8.3.1 Configuring Citizen's Contact Information

The following system properties are provided to dictate the display order of types of phone numbers, emails and addresses displayed for a citizen. These configuration setting only apply to citizens registered on a Cúram system.

- `curam.citizenaccount.contact.information.phone.number.display.order` - dictates the display order of the different types of phone numbers. The default values are PH1,PH2,PH3,PH4,PH5,PH6 on the PhoneType code table. These translate to personal, business, mobile, fax, pager, other.
- `curam.citizenaccount.contact.information.email.addresses.display.order` - dictates the display order of the different types of email. The default values are ET2 and ET1 on the EmailType code table. These translate to business and personal.
- `curam.citizenaccount.contact.information.email.addresses.display.order` - dictates the display order of different types of addresses. The default values are AT4,AT1,AT5,AT6,AT2,AT3 on the AddressType code table. These translate to private, rented, institutional, mailing, business and registered.

8.3.2 Configuring Case Workers Contact Information

The following system properties are provided to dictate whether case worker contact information is displayed to a citizen and if displayed additional system properties are provided to dictate the type of contact information displayed:

- `curam.citizenaccount.contactinformation.show.caseworker.details` - dictates if case worker contact details are displayed in the citizen account. If this property is set to true case worker contact details of cases associated with the logged in citizen are displayed. If this property is set to false case worker contact information is not displayed. The default value for this property is true.
- `curam.citizenaccount.contactinformation.show.businessphone` - if case worker contact details are displayed this property dictates if the case worker's business phone number is displayed. The default value of this property is true.
- `curam.citizenaccount.contactinformation.show.mobilephone` - if case worker contact details are displayed this property dictates if the case worker's mobile number is displayed. The default value of this property is true.
- `curam.citizenaccount.contactinformation.show.emailaddress` - if case worker contact details are displayed this property dictates if the case worker's email address is displayed. The default value of this property is true.
- `curam.citizenaccount.contactinformation.show.faxnumber` - if case worker contact details are displayed this property dictates if the case worker's fax number is displayed. The default value of this property is true.
- `curam.citizenaccount.contactinformation.show.pagernumber` - if case worker contact details are displayed this property dictates if the case worker's pager is displayed. The default value of this property is true.
- `curam.citizenaccount.contactinformation.show.casemember.cases` - dictates if case worker contact information is displayed for cases (product deliveries and integrated cases) where the client is a case member. If this property is set to true, cases(product deliveries or integrated cases) where the client is a case member are displayed. If this property is set to false, then only cases where the client is the primary client are displayed. Note: this property only applies to cases originating from a Cúram system. The types of product deliveries and integrated cases to be displayed can be configured in the

Product section of the Cúram Administration Application. For more information on administering this see the Cúram Integrated Case Management Configuration Guide.

Chapter 9. Configuring Life Events

9.1 Introduction

This chapter provides an overview of the configurations available for defining life events in UA administration. UA administration allows an agency to define different types of life events, for example, Having a Baby, Changing Jobs and so on. Once defined, life events are displayed in the citizen account in UA allowing citizens to submit information to the agency as well as providing a citizen with useful information and resources relating to a particular life event. Life events can also be made available in other channels, for example, life events can be submitted online by a case worker in an internal application. Configurations allow for different information to be displayed depending on where the life event is initiated from, for example, the Changing Jobs life event question script displayed to a citizen can be different to the Changing Jobs life event question script displayed to a case worker.

There are five main aspects to configuring life events:

- configuring the name of the life event and a schema to store data submitted using a life event
- configuring channel specific information such as an IEG question script to collect data, a rule set to display recommendations, display information and mapping to dynamic evidence types
- configuring categories to group life events together
- associating remote systems where life event information can be sent to

This chapter outlines these aspects in more detail.

9.2 Configuring a Life Event

The New Life Event page is used to configure a life event in UA Life Event Administration. This section provides more detail on the configuration options.

9.2.1 Defining a Name and Display Name

A name must be specified and uniquely identifies the life event. This name is only displayed in the administration application. A schema must be specified if the life event allows for a citizen or user to submit information to the agency. The schema defines where the information submitted by a citizen or user in the life event script is stored. For more information on defining data store schema see the *Cúram Working With Intelligent Evidence Gathering Guide*.

9.2.2 Defining a Question Script, Answer Script and Schema

An IEG script must be defined for the life event if the life event allows a citizen or user to submit information to the agency. The IEG script is used to collect the answers to a set of questions related to the life event. A script name can be specified in the Question Script field. A schema must also be specified if the life event allows for a citizen or user to submit information to the agency. The schema defines where the information submitted by a citizen or user in the life event script is stored. A schema can be specified in the Schema field. An answer script must be specified to allow a citizen to review the answers they have provided to the questions during submission of the life event. An answer script can be specified in the Answer Script field.

On saving the life event, empty template scripts and a schema will be created by the system based on the Question Script, Answer Script and Schema specified. It will then be possible to update these from the Life Event tab by selecting hyperlinks provided on the page. Clicking on the Question Script and Answer Script links will launch the IEG Editor which will allow the scripts to be edited. Clicking on the Schema link will launch the Datastore Editor which will allow the schema to be edited. Existing schema, question scripts and answer scripts can be utilized by selecting them on the Edit Life Event page.

Note: if a life event has been configured to send information to remote systems the Finish Page field in the script properties(accessed by selecting Edit->Configure Script Properties in the IEG Editor) should be set to cw/DisplayRemoteSystems.jspx.

For more information on defining IEG scripts and schema see the Cúram Working with Intelligent Evidence Gathering Guide.

9.2.3 Defining a Channel Type

The channel type defines the channel in which a life event is used, for example, 'Online' or 'Internal'.

9.2.4 Defining a Display Name

The display name represents the name of the life event that will appear to a citizen or agency worker. For example, a change of job life event could be displayed as ' Lost My Job' to a citizen but 'Client Loses Job' to a case worker.

9.2.5 Defining a Common Life Event

UA displays a list of common life events in the citizen account. Common life events represent life events that may happen frequently in people's lives, for example, having a baby, changing jobs. Setting the common indicator means that the selected life event will appear in the common life events listing in the citizen account.

9.2.6 Defining Citizen Consent

For certain life events, a citizens consent may be required before sending information to a remote system/agency. The Citizen Consent Enabled field allows an administrator to dictate if a citizens consent is required or not. This means that the citizen is given the opportunity to select the agencies they would like to send their life event information to. If this indicator is specified, a list of remote systems are displayed to a citizen on completion of the life event script. If this indicator is switched off, the citizen will not be presented with a list of remote systems. If only one remote system is associated with the life event, the Citizen Consent If One Choice Only field is provided to dictate if the citizen is presented with the remote systems list and must specify their consent to send information to this remote system by selecting it on completion of the question script.

9.2.7 Defining a Launch Button Label

The launch button label used to launch the life event question script can be specified in the Launch Button Label field. If this is not specified, a default value of 'Launch Life Event' is used.

9.2.8 Defining A Display Description

A high level definition describing the life event can be defined. This can then be displayed in the channel in which the life event is being displayed. Rich text is supported.

9.2.9 Defining Additional Information

Additional information can be specified which relates to the life event. This can be used to display links to useful websites or information which the agency deems relevant to a particular life event.

9.2.10 Defining Submission Text

The text to be displayed to a citizen post submission of a life event can now be configured. If text is not configured, default text is displayed. The following default text is displayed if a rule set has not been defined for the life event: 'Your information has been submitted' . If a rule set has been defined, the following default text is displayed: 'Your information has been submitted. Based on the information you have given us, we have identified services and programs that may be of use to you. View your results'.

9.2.11 Mapping Life Event Information to Evidence Entities

Information gathered in the life event script is stored in the data store schema defined for the life event. In order to pass this information into the Cúram system it must be mapped to dynamic evidence entities. Dynamic Evidence entities must be firstly defined in the Rules and Evidence section of the administration application. Once defined, these entities must be specified as Social Record Evidence Types in the Universal Access section of the administration application. An indicator is also provided which will allow an administrator to dictate if a particular evidence type will be visible to a citizen in the portal(My Information in the citizen account) or not. Once the social record evidence entities are defined, the Data Mapping Editor(accessible from the Mappings tab on the life event) can be used to map the data from the data store to the appropriate evidence entities.

When a life event is submitted from the portal the information gathered is mapped (using the mappings defined above) to evidence entities associated with a new case type called a social record case. The Evidence Broker can then be used to pass the information from this case to the appropriate ongoing client cases.

For more information on Dynamic Evidence see the Cúram Dynamic Evidence Configuration Guide. For more information on data mapping see the Cúram Data Mapping Editor Guide. For more information on the brokering of evidence see the Cúram Evidence Broker Guide.

9.3 Categorizing Life Events

Life event administration allows for similar life events to be categorized or grouped together, for example, changing jobs, changing address and changing income life events could be categorized within an employment category. Categorizing life events makes it easier for a citizen or user to find the life event they need. Categories are defined in life event administration and can then be associated with a life event. When defining a category, a name and description must be specified. Life events can then be associated with the category. An icon can also be specified for a category which is then displayed in the citizen account beside the category name.

9.4 Defining Remote Systems

Life event information can be submitted to remote/external systems. In order for life event information to be sent to a remote system, a remote system must be associated with a life event. The remote system must have the Life Event Service web service associated with it. This is used to transmit life event information to the remote system. Remote Systems can be configured in the Remote Systems section of the administration application. For more information on Remote Systems see Chapter 12 of this guide.

Chapter 10. Configuring Authentication Factors

10.1 Introduction

This chapter provides an overview of the configurations available for defining authentication factors in UA administration which are used to apply second level authentication to linked citizens when they log in to the UA. UA administration allows multiple authentication factors to be defined, for example, SSN, date of birth. Once defined, and second level authentication is activated, a citizen will be requested to submit the additional information when logging into the system.

10.2 Configuring An Authentication Factor

The Authentication Factors page is used to define an authentication factor. The sections below detail authentication factor configurations.

10.2.1 Configuring Help Text

The help text allows text to be defined which is displayed to a citizen when the authentication factors are displayed to a citizen when they log in to the UA. This text can be used to describe to a citizen what they need to do in order to successfully login.

10.2.2 Configuring A Title And Description

The title allows an administrator to define what is displayed to a citizen in UA to identify the data that should be entered, for example, 'Please enter your date of birth' or 'Date of Birth'.

The description allows an administrator to specify a description of the authentication factor. This description is only visible in the UA administration application.

10.2.3 Configuring A Name

In order to authenticate the data submitted by a citizen, authentication handlers must be created. For example, to authenticate the date of birth submitted by a citizen, an authentication handler exists which contains a class to authenticate the data submitted by a citizen against the date of birth stored on the Cúram system (or an external system). The name defined for each factor identifies the handler used to authenticate the data. Three authentication handlers are provided out of the box - date of birth, SSN and PIN. For more information on creating authentication handlers see the Cúram Universal Access Customization Guide.

10.2.4 Configuring Domain Name

The domain name is used to define the type of data entry field displayed to a citizen to capture information related to an authentication factor. For example, if a date of birth needs to be entered then the field displayed to a citizen must have a date selection icon beside it which allows the citizen to select a date.

10.2.5 Configuring A Display Order

The display order allows an administrator to dictate the order in which the authentication factors are displayed to a citizen relative to other authentications factors. For example, date of birth can be displayed first, followed by SSN.

10.2.6 Activating An Authentication Factor

An authentication factor can be activated/deactivated at any time. Activating an authentication factor means that the citizen will be requested to submit this information in order to successfully login.

Deactivating an authentication factor means that the authentication factor is not displayed to a citizen in the UA and hence the citizen does not have to provide this information at login.

10.3 Activating Second Level Authentication

Second level authentication can be activated/deactivated at any time. Activating second level authentication means that all active authentication factors will be displayed to a citizen and the citizen will have to submit appropriate data in order to successfully login. Deactivating second level authentication means that no authentication factors will be displayed to a citizen. A citizen will only have to submit a user name and password in order to successfully login.

Chapter 11. Configuring Languages

11.1 Introduction

This chapter provides an overview of the configuration options available for defining the languages that UA is available in.

11.2 Configuring A New Language

The New Language page allows the user to define the languages that UA is available in. Once defined, the languages are displayed on the UA home page. Languages should only be defined for the languages for which the application has been localized.

The Display Name allows an administrator to define the information that will be displayed on the UA Home page, for example, English, Deutsch. The Language drop down allows a user to specify the language that the application is available in.

Chapter 12. Configuring Remote Systems

12.1 Introduction

This chapter provides an overview of the configuration options available for defining remote systems. Applications and life events may be processed on systems other than Cúram. Remote systems can be configured allowing applications and life event data to be sent to them for processing via associated web services.

12.2 Configuring A Remote System

Remote systems are configured in the Universal Access section of the Administration application. A name and Root URL must be specified. The Root URL represents the root Uniform Resource Locator (URL) of the remote system. It consists of the Protocol (http or https), Host Name (for example, shell) and Port (for example, 9082) . An example for root URL is http://shell:9082/. A Display Name can be configured which is used to display the name of the agency associated with the remote system. This is used in the citizen account when a list of remote systems are displayed to a citizen. It should be used to represent a more meaningful agency name to a citizen rather than using the remote system name. The Source User Name represents the user name that the remote system uses when invoking inbound Cúram web services.

12.2.1 Adding a Service to a Remote System

A target system can have multiple services associated with it. A URL must be defined for every service associated with a remote system. The URL is used for identifying and interacting with the service in the remote system. The URL is based on the combination of the root URL of the remote system, consisting of the system host name and port, and the extension URL for the associated service. For example, a URL http://shell:9082/ProcessApplicationService for a process application web service on a remote system is the combination of the root URL(http:// shell:9082/) of the remote system and the extension URL(ProcessApplicationService) of the associated process application service. The Invoking User Name and Password define the user name and password required to communicate with the web service on the remote system.

Chapter 13. Configuring Motivations

13.1 Introduction

The purpose of this chapter is to describe the configuration options available for 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. Running a motivation results in a configurable results page. This chapter outlines these aspects in more detail.

13.2 Configuring a New Motivation

The following options are available when configuring a motivation:

Name and Reference

A name and reference must be specified when creating a new motivation. The name uniquely identifies the motivation. The reference is used to reference the motivation in code.

Script and Schema

An IEG script must be defined for the application which is used to collect the answers to the application questions. A script name must be specified in the Script field. A data store schema must be specified to store the data entered in the script. A schema name must be specified in the Schema field. On saving the motivation, an empty template for both the script and schema will be created by the system based on the Script and Schema specified. It will then be possible to update these from the Motivation t by selecting hyperlinks provided on the page. Clicking on the Question Script link will launch the IEG Editor which will allow the question script to be edited. Clicking on the Schema link will launch the Datastore Editor which will allow the schema to be edited.

Ruleset

To process the data in the data store and to produce a result, a CER rule set must be specified. Once specified on creation of the motivation, an empty rules template will be created by the system. It will then be possible to update the ruleset from the Motivation tab by selecting the hyperlink provided on the page. Clicking on the link will launch the CER Editor which will allow the ruleset to be edited. For more information on writing motivation rule sets, see the *Cúram Universal Access Customization Guide*. For more information on using the CER Editor see the *Working With CER Guide*. For more information on the IEG Editor see the *Working With Curam Intelligent Evidence Gathering guide*.

Result Schema

The running of a motivation results in a set of results. These results(the result of a ruleset execution) are stored in a data store. The Result Schema allows for a schema to be specified for these results which allows for the extension of the information generated as a result of running rules.

13.3 Configuring the Motivation Results Page

When a motivation is run, a results page is displayed. This results page is displayed through a combination of display rules and application configuration. This section describes how to supply the configurable elements of the results page.

13.3.1 Configuring the Household Member Tooltip

As a result of running a motivation and performing actions from the results page, each household member will have a status per program e.g. 'Potentially Eligible'. This information is displayed for each

household member in a tooltip on the results page. A sysadmin property (`curam.citizenworkspace.motivationresults.householdmemberstatuses.householdmembertooltip.exclude`) is provided which dictates the types of household member states to be **excluded** from the household member tool tip.

13.3.2 Configuring My Items

As a result of running a motivation and performing actions from the results page each household member will have a status per program e.g. Potentially Eligible. These states are stored in the `MotivResultMemberStatus` code table. A sysadmin property `curam.citizenworkspace.motivationresults.householdmemberstatuses.myitemstooltip.include` is provided which dictates the types of household member states which should be included for display in the My Items tooltip.

13.3.3 Configuring Result Actions

The actions to be displayed for a given result state can be configured, for example, if the status of a result is 'Ready To Enroll' an action of 'Enroll' can be configured for display to the citizen. For each action, a Name and Display State must be specified. A URI can be specified which defines the page to open when a citizen selects an action. Another motivation can also be initiated from a result action. The Type field defines whether another motivation is initiated or whether the page specified in the URI field should be initiated. If another motivation is to be initiated, the Motivation Reference must be specified.

13.3.4 Configuring Result Categories

The results of a motivation can be categorized together, for example, the set of programs that a citizen is eligible for can be categorized together and displayed on the results page. Help Text and a set of actions applicable to a category can be defined.

13.3.5 Configuring Icons

Person icons are displayed on a result to represent the state of the person. A base icon and a secondary icon can be configured. The base icons represent eligibility and ineligibility for a female adult, female child, male adult and a male child. A secondary icon can be used to place a secondary icon on top of the base icon. For example, a tick can be placed on top of the base icon to represent an enrolled person. Icons can be configured in the `MotivationResultsPersonStatusIconMapping` property file.

13.3.6 Configuring Additional Result Information

Additional information can be displayed on the results panel if required. An application resource property, `MotivationResultsProgramDetailsURLMapping`, is provided which contains a result reference and a link to a UIM fragment allowing customers to define the page to be displayed. If no link is defined, nothing is displayed.

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