

IBM Cúram Social Program Management
Version 6.0.5

Cúram Address Guide



Note

Before using this information and the product it supports, read the information in "Notices" on page 9

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Cúram Address Guide

An address can be stored for a participant. It is used during participant registration and communications, as a component of payments and invoices, and when you enter contacts for participants. Address information can also be used to search for participants in the Cúram application.

Introduction

Purpose

This guide provides an understanding of addresses and how they are used in the application. In order to best understand these concepts, the guide should be read in full.

Audience

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

Prerequisites

Readers should have a basic understanding of the application before reading this guide.

Chapters in this Guide

Using Addresses

This chapter provides information on the ways in which address is used in the application.

Address Types

This chapter describes the different types of address in the application.

Maintaining Addresses

This chapter describes how to configure, enter, view, modify and cancel addresses in the application.

Using Addresses

You can use addresses for various tasks related to participants. The first address entered for a participant is the primary address. Address information can be used to search for participants. Addresses are used to establish the destination for communications, payments, and bills.

Introduction

Address is an important piece of information that is stored about a participant and is used in a number of different parts of the application. It is used as part of initial participant registration, as a component of setting up communications between the organization and the participant, as a component of payments and invoices to a nominee and as an element of entering contacts for participants. Address information can also be used to search for participants in the application.

Address information can be maintained for all participant types although it is optional for prospects and representatives. Address information is used to establish

the destination for payments and bills issued by the organization. Check payments, voucher payments and invoices cannot be sent to a participant unless the participant's address is recorded. Address information can be used as an additional means to identify participants. It can also be used as an alternative to information like name or reference number when performing searches for participants.

The Primary Address

The first address entered for a participant is the primary address and it is displayed throughout the application. A participant can only have one primary address of each address type: postal, web and email. It ensures that multiple correspondences, payments and bills that can exist in a case are automatically directed to a single address, unless otherwise specified. Primary address functionality does not apply to the organization or its locations.

Where the organization is using participant evidence to maintain person and prospect information, see the Cúram Participant Guide for further details on how the person or prospect persons address is derived.

Using Address as Part of Participant Registration

Address information can be used to determine if a participant is already registered. Before entering a participant's details into the system, users can confirm that the person is not already registered. A person's address can be entered here to make sure that they have not already been registered. This prevents duplicate records being created. To complete a participant's registration, a primary address must be entered. For prospect persons, if an address is unavailable, an "Address Unavailable" place holder is used. For persons and prospect persons, the primary address is automatically set to the private address type. For every other participant type, the primary address is automatically set to business. Listed address types for all participants can easily be changed after registration.

Additional addresses can be entered for person, employer and prospect employer participants at registration. When registering an employer a business address and a registered address must be provided. A mailing address can be entered in addition to the primary private address for person participants, although it is not mandatory. Prospect employers can have an additional registered address type entered at registration.

Using Address to Search for Participants

The application utilizes a separate pop up participant search window whenever a user is required to enter a participant's details into the system. This search window allows the user to search for a participant using address details. For example, when creating or recording communications such as email, pro forma etc; address can be used to search for participants involved in the communication.

If a primary address for a participant is known, then the participant can be searched for using that address from the participant search page. Users can enter the first line of the address or the city to search for all participants at a certain address. All participants that share that address will then be shown. It is important to note that only a participant's primary postal address may be searched for. In the case of employers and prospect employers, only primary business addresses may be searched for.

Using Address to add a Contact for a Participant

When entering a new contact for a participant, address information can be used to search for the participant who is to be added as a contact; provided they are already registered on the system. Employers and prospect employers that are to be added as contacts can be searched for by business address details. If the contact to be added for a participant is not registered on the system, address details for the contact must be added manually.

Using Address to Communicate with a Participant

There are a number of different ways of recording, sending and receiving communications between participants and the organization. Caseworkers can choose an appropriate address from a list of those recorded for a participant when corresponding with the participant. If a communication exception exists for a participant, caseworkers will not be able to send a correspondence to the address type specified in the communication exception. A communication exception is used to indicate that a participant does not wish to receive, or cannot receive, communications from the organization in the format specified. If a correspondent has an active communication exception, a communication cannot be created using that method.

Participant communications received and sent by the organization can be recorded from the communications page of the participant manager. On the recorded communication page, participants can be searched for by their addresses in a separate pop up participant search window. Similarly, when creating Microsoft Word, pro forma and email communications for registered participants; address information can be selected for participants from a pop up address list page for that participant. Addresses must be entered manually for communications to unregistered parties.

Using Address to Issue Payments and Invoices

Address information is used to establish the destination for payments and bills. Payments and bills issued by the organization are automatically sent to the primary address specified for the nominee at registration. The address to which payments and bills are sent to can be configured according to the preferences or needs of the nominee. For example, a nominee may prefer to receive payments at a work address than at a home address. A nominee cannot receive payments and bills at a new address unless the address is recorded on the system and then specified as the destination for future payments and bills. The system also maintains a history of previous payments and bills issued to the old address.

Address Types

There are three types of participant address: postal, email, and web address.

Introduction

This chapter provides an overview of the different types of address in the application.

Three types of address can be recorded for participants: postal address, email address, and web address. Participants can have multiple addresses attached to their profile. Participants can have primary postal, email and web addresses. Secondary addresses can be recorded for each of the address types. For the purposes of this guide, the term secondary address refers to any address that a participant has in addition to the primary address.

Postal Addresses

Postal addresses are required by the organization as a destination for case correspondence, bills and payments. It is mandatory to have a postal address recorded for all participants except representatives, prospects persons and prospect employers. Participants can have a number of addresses recorded, only one of which can be primary. There are six different postal address types: rented, registered, private, mail, business, and institutional.

Bank branches, as the locations of a bank; can have addresses recorded in the Administration application. Locations within the organization can also have postal addresses maintained in the Administration application.

Web Addresses

A web address is the location of a web page on the Internet. Web addresses are officially known as Uniform Resource Locators, or URLs for short. It is not mandatory for participants to have a web address. Participants can have a number of different web addresses recorded, only one of which can be primary. There are eight types of web address: general services, insurance, education, employment, health, financial, personal and private.

The organization and organization sub-units can also maintain web addresses. This is maintained in the administration application.

Email Addresses

An email address identifies a location to which email can be delivered. It is not mandatory for participants to have an email address. Email addresses are required by the organization to communicate by email with participants. Participants can have a number of email addresses recorded, only one of which can be primary. The organization and organization sub-units can also maintain email addresses. There are two types of email address: business and personal.

The organization and organization sub-units can also maintain email addresses. This is maintained in the administration application.

Maintaining Addresses

You can create, view and update addresses for participants. Participant addresses and address lists can be viewed and modified. Address format can be administratively configured.

Introduction

When an address is entered from within a case, that address becomes part of the member's person details in the participant manager. It is stored in the list of addresses for the participant. This enables the data to be manipulated with as much flexibility as possible while also keeping the potentially sensitive address information as secure as possible. The application keeps a detailed record of all previous addresses that a participant has used while registered as a participant. The system also maintains a history of previous payments and bills issued to the old addresses.

Address To and From Dates

To and from dates are common to all address types. The to date specifies the date until which the address is valid, while the from date specifies the date from which

the address is valid. The from date for an address is automatically set as the day the address is registered unless otherwise specified. To and from dates also allow the user to see at a glance a participant's previous address history.

When the to date of an address has passed, the application displays a message on the participant's address page which says that the end date of the primary address has passed.

Entering Addresses for Participants

By default, the initial address entered for a person at registration is a private address. This can be changed after registration. The default address at registration for employers and prospect employers is business address. Additional postal addresses can be entered for existing participants from the relevant participant manager home page.

If it is the first postal address entered for a participant, the system sets it as the primary postal address. Creating a new primary address will automatically supersede a previous primary address.

Web addresses and email addresses can be entered for existing participants from the participant manager page. Web and email addresses are functionally similar to postal address: if it is the first web or email address entered for a participant, the system sets it as the primary address of that type. If the web or email address submitted is indicated to be the primary address, and a primary web or email address already exists, the system updates this new address as the primary address of that type. Further web and email addresses can be added after registration by clicking on the relevant address link from the navigation side bar of the participant manager page. Any of the different web and email address types may be considered a participant's primary web or email address.

Nominee address can be changed from the nominee details page. Here, existing postal addresses can be edited and new addresses can be added as required. This enhances the flexibility of product delivery cases by allowing for a user's change of address during the course of a case. If a user modifies a nominee address that is currently the destination for payments and bills, future payments and bills are automatically issued to the modified address.

Viewing Addresses and Address Lists

A participant's primary postal address is displayed on the integrated case member home page. It can also be viewed on the participant manager homepage. postal, web and email addresses are maintained in their own sections of the participant manager. Clicking on the appropriate address link from the navigation side bar of the participant manager brings up a list of addresses. Individual address entries can be viewed in their entirety by clicking on the desired address from the address list. When viewing address lists, additional information such as address to and from dates; whether the address is active or canceled, and the primary indicator are displayed.

Nominee address can be viewed from the nominee details page. A nominee's address is also displayed on the payment instruction details page. The address to which a payment is sent is kept so that should the address of the nominee is changed, the exact details of where a payment was sent are known. For example, when a check or voucher is sent to a nominee the address to which it was sent is captured as part of the payment details and is visible thereafter from the payment

instruction details page. Should the nominee subsequently change address, the exact details of where the payment was sent is kept.

Modifying Addresses

Participant addresses can be modified from the participant manager. Only users with sufficient security privileges can modify participant addresses. The application also keeps a detailed record of all previous addresses that a participant has used. When modifying the primary address, it is not possible to remove the primary indicator. To change the primary indicator to a different address, the user must create another address and change the new address to primary. An existing secondary address can also be changed to a primary address. Setting an address status to primary automatically overrides the primary status of any previous address associated with that participant.

Support for Mapping of Addresses

Longitude and latitude details are included in the data that may be recorded for a participant address. Address insert and modify both support the capture and storing of these values. Recording of this detail allows implementation of mapping features such as Google Maps.

In order to enable the retrieval and storage of geocodes for participant addresses, the property *curam.miscapp.geocode.enabled* should be set to true. Cúram supports the retrieval of geocodes and the display of addresses with geocodes on Google maps via the implementation of either the Google Maps API or the Google Maps for Business API, depending on usage requirements. The Google Maps for Business API uses the same code base as the standard Google Maps API but provides additional features such as higher usage limits.

To use the Google Maps API, the property *curam.miscapp.geocode.googlemapsapikey* should be used to store the API key. Using an API key enables monitoring of the application's Google Maps API usage, and ensures that Google can contact the key holders about the application if necessary. To use the Google Maps for Business API, the properties *curam.miscapp.googlemapsapi.client.id* and *curam.miscapp.googlemapsapi.client.key* should be used to store the Client ID and Cryptographic Signing Client Key respectively.

NOTE: Enabling the *curam.miscapp.geocode.enabled* property will trigger the use of the Google Geocoding API V3. Customers using this API will be deemed to have accepted Google Maps Terms of Service, and hence should review these before enabling this property. See <https://developers.google.com/maps/terms>

Canceling Addresses

Participant addresses can be canceled from the view address details page. Canceled addresses are stored for future reference and cannot be removed. Once an address has been canceled, it cannot be renewed. The primary address cannot be canceled, but may be superseded by a new primary address.

Configuring Addresses

Address Properties

Address properties can be altered in the property administration section of the administration application. Address properties that can be altered are *curam.address.nondefaultaddressallowed* and *curam.address.addressDataLocaleForDefaultAddresses*. The first property allows

administrators to alter whether a user is allowed to enter an address in a format other than the system default layout. For example, If a user is recording a communication; a user can only enter a participant's address that differs from the default layout if this property is enabled. The second property enables the locale for an address to be set for which no details are provided. In effect, this allows a user to enter a place holder instead of an address if an address is not provided. This allows the user to enter an address at a later stage when one becomes available.

Address Formats

The application provides the ability to customize address formats. Although the user sees several fields when entering a participant's address, addresses are stored as a single string field. The elements that make up the address are defined in the `curam-config.xml` file. This file can be configured so that a participant's address can be displayed in U.S., U.K., Canadian, Japanese, Chinese, Taiwanese, South Korean or freeflow formats in the application. For example, in the U.S. implementation, the first line of a postal address is labeled apartment/suite number. In the UK implementation, the first line of a postal address is labeled address line 1. In the Chinese implementation, the first line of a postal address is labeled postal code.

For more information on altering address formats, see the *Cúram Web Client Reference Manual*.

Conclusion

Summary

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

- There are a number of different address types: postal address, web address and email address.
- Participants can have multiple addresses, only one of which can be the primary address. the primary address must be provided at registration. Without it, a case cannot be fully processed.
- Maintaining addresses involves a working knowledge of the following topics: address formats, address to and from dates, entering addresses, modifying addresses, and canceling addresses.
- Addresses are used as a component of communication with participants, issuance of payments and invoices, address search, and contact search.

Additional Information

This guide is a supplement to the information covered in the core business guides. They are as follows:

Cúram Integrated Case Management Guide

This guide covers the basic concepts of case processing.

Cúram Participant Guide

This guide covers the basic concepts of participant functionality.

Cúram Financials Guide

This guide covers the basic concepts of financial processing.

Cúram Service Planning Guide

This guide provides an overview of service planning.

Cúram Workflow Overview Guide

This guide provides an overview of workflow.

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