



## A Walk-through of IBM Case Manager

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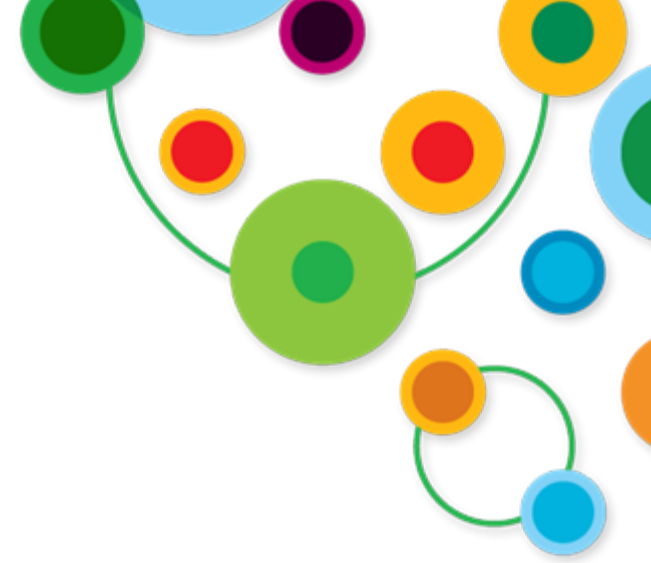
**Information On Demand 2010**

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# Agenda

- **Case Manager Overview**
- Key Capabilities
- Demonstration
- Benefits



# Case Management is all about providing context to enable better outcomes

## A solution pattern where...



- There are **collaborative**, ad-hoc processes
- Activities are **event-driven**
- Work is **knowledge** intensive
- **Content** is essential for decision making
- **Outcomes** are goal-oriented
- The judgment of people impact how the **goal** is achieved
- **Process** is often not predetermined

## For challenges such as...



- Complex decision making
- Complaint or dispute management
- Contract management
- Lending applications
- Benefits enrolment
- Rate case management
- ...that are both **horizontal** and **vertical** in nature

## That requires unique capabilities from...



- Content management
- Business process management
- Collaboration tools
- Social software
- Business rules
- Analytics

# Different types of 'Cases' across industries

## .... Similar patterns and challenges

Invoice, contract, employee, vendor, customer, project, change request, complaint, exception, incident, audit, eDiscovery, etc.



### INSURANCE

- Customer
- Policy
- Underwriting
- Claim
- Annuity



### BANKING

- Loan
- Dispute
- Mortgage
- Account
- Credit card
- Personal line
- Investment



### HEALTHCARE

- Patient case
- Member
- Provider



### GOVERNMENT

- Benefits enrolment
- Grant
- Court case
- Citizen
- Taxpayer



### ENERGY

- Rate case
- Claim
- Permit
- Land
- Property

# Advanced Case Management Strategy

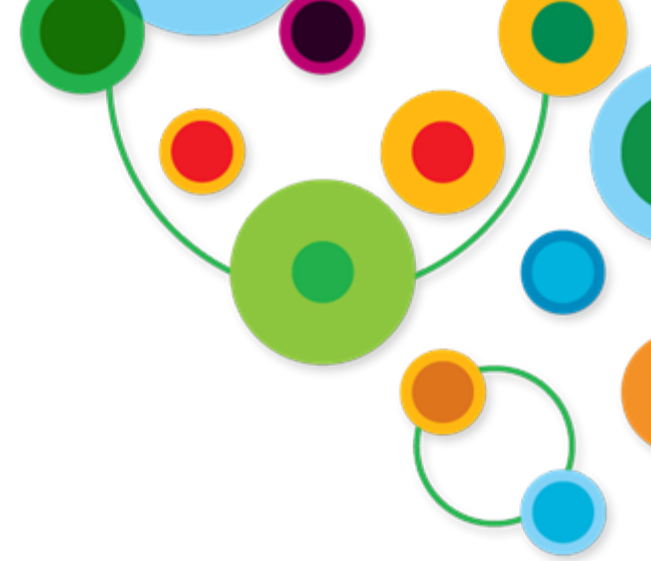


## Business benefits

- Better business and IT collaboration to define solutions
- Faster build and deploy times via better tools and solution templates
- Delivering complete case context for case workers with ability to collaborate within case teams
- Optimizing case outcomes thru business rules, cross case analytics, monitoring, and collaboration

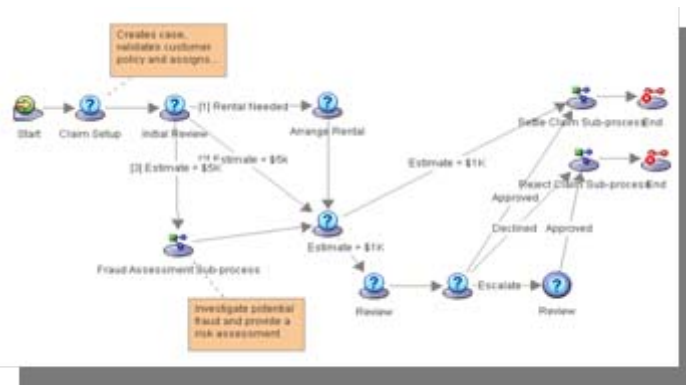
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# Case Manager Tasks

Tasks are tied to Processes



Participants can refine case tasks as they proceed



ACM uses a task-oriented approach to define the structure of a case

Cases and in-baskets reflect the tasks that need to be completed, regardless of where they came from

New tasks can be added to cases on the fly

Tasks can vary in complexity



# Full Case Context

## Documents

Forms  
Correspondence  
Receipts  
Statements

## History

Case Created  
Document Added  
Comment  
Review started



## Properties

Customer Name  
Priority  
Transaction IDs  
Account Number

## Tasks

Initial Case Review  
Email the Customer  
Investigate Claim  
Issue Refund

# Cases are Collaborative

Case workers can locate and chat with each other directly through the Case Manager runtime

Mozilla Firefox: IBM Edition

http://snjgsa.ibm.com/~rbltee/public/ACM/live/R

**John Dunn**  
Case Work Supervisor

Vivian Birch Hey John, got a quick sec? 12:56:52 PM

John Dunn Sure, what's on your mind? 12:56:55 PM

Vivian Birch I am starting to think there might be some discrimination in the Tracy McShay case re her vision impairment 12:56:57 PM

John Dunn Interesting - go ahead and check it with legal 12:56:59 PM

Done

**John Dunn**  
Case Work Supervisor

Send Mail | More actions

Shared comments and case history provide context

**Comments**

Case: CCD1\_ManageDispute\_000000100011

Comment:

Add

Items 1 - 3 Previous | Next

**Today** Oct 21, 2010

Reviewed and accepted the submission Oct 21, 2010 8:10:18 AM P8Admin

Updated contact information Oct 21, 2010 8:10:12 AM P8Admin

Called to reschedule appointment Oct 21, 2010 8:09:52 AM P8Admin

**Case Information**

Documents Tasks

History

Show: Summary for: All

Items 1 - 10 Previous | Next

**Today** 10/21/2...

Reviewed and accepted the s... 10/21/1... P8Admin

Comment added to case 10/21/1... P8Admin

Updated contact information 10/21/1... P8Admin

Comment added to case 10/21/1... P8Admin

Called to reschedule appoint... 10/21/1... P8Admin

Comment added to case 10/21/1... P8Admin

**Yesterday** 10/20/2...

Generate Correspondence 10/20/1... P8Admin

Task started 10/20/1... P8Admin

Correspondence 10/20/1... P8Admin

# Cases are Dynamic

Case Information

Case ID: Case ID [Open case details](#)

Documents Tasks History

Add Activity

▼ Required (4)

- Background check [Disable](#)
- Determine benefits eligibility [Start](#) | [Disable](#)
- Document review  
Started on 4/30/2010 15:09
- Application completion check  
Completed on 5/20/2010 08:18

▼ Optional (3)

- Background review  
[An error occurred More Info](#)
- Background review  
[An error occurred More Info](#)
- New document review  
Completed on 5/3/2010 15:09

▼ Disabled (1)

- RA benefit review

Case workers can view and start new Tasks for a case, changing how that case is handled on-the-fly

Add Task

Activity type:  
Review Case Details

Activity name:  
Review Case Details

OK Cancel

Case ID Date modified: MM/DD/YY | [Case Type] | Case description goes here even if it's a long description. The description will truncate at the end here...

Comments Add Task Close

Case workers can even add new Tasks to a case

# Business Rules Make Case Manager More Dynamic

Rule definition  
in natural  
language...

```
if the manager name of the account of 'the payment plan' is "John"  
and  
    the number of payments of 'the payment plan' is 1  
then  
    set the discount of 'the payment plan' to 60;
```



Case properties, UI context, and case events  
can all feed decisions

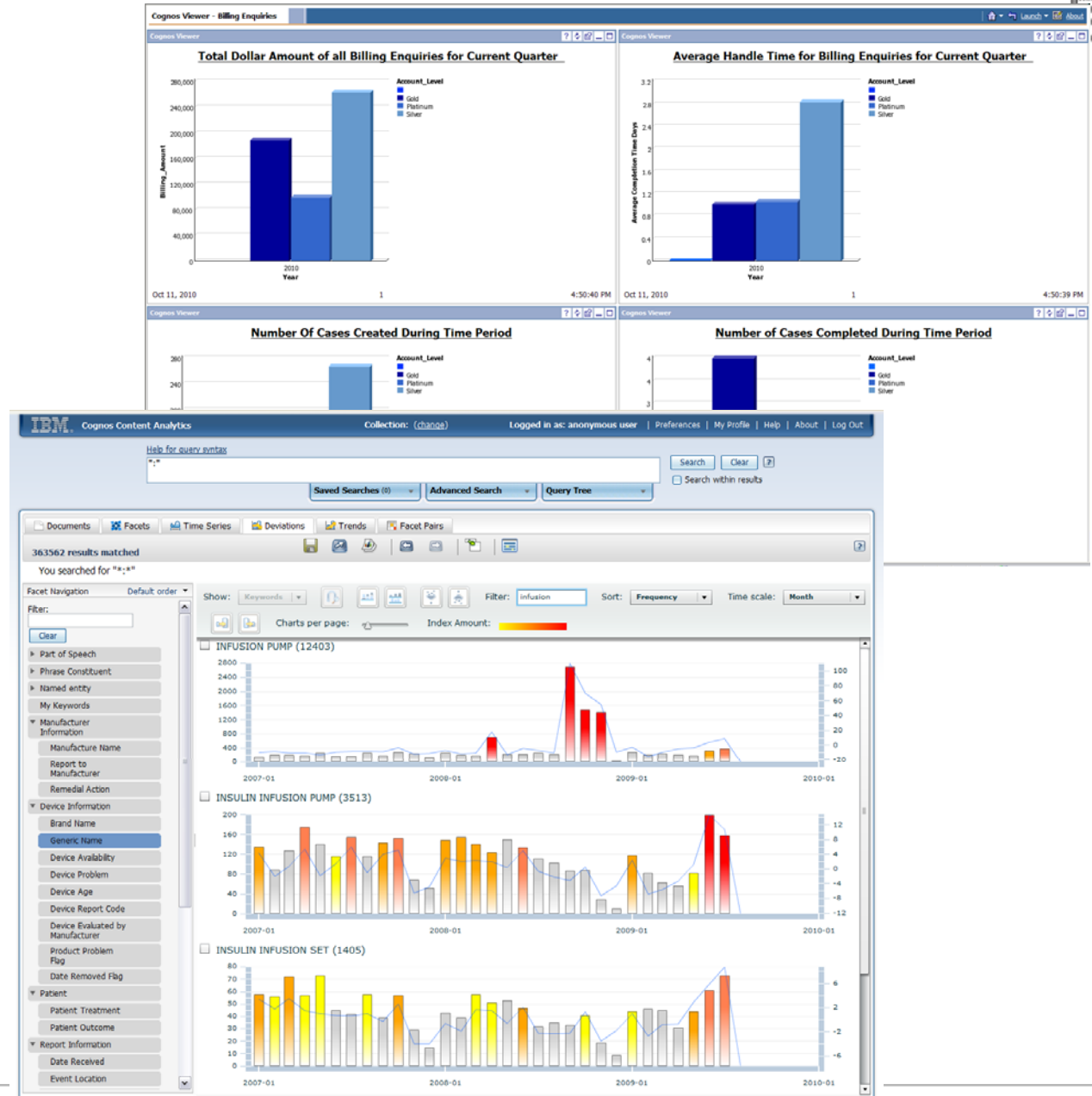
Rules can be changed at runtime, minimizing  
the need to re-deploy processes and solutions



# Case Analytics

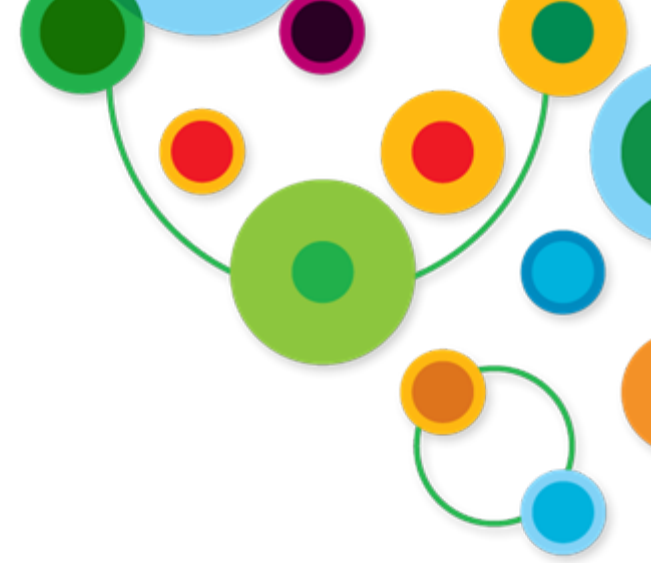
Out of the box reports and content analytics enable business users to

- review operational performance and
- determine the root causes of inefficiencies



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**Creating the solution**


Select a template

From a blank template  Use the wizard to define the solution

**Credit Card Disputes** 

Solution for managing credit card disputes  
Last modified by P8Admin on September 7, 2010 

[Edit](#) | [Open wizard](#) | [Deploy](#) | [Test](#) | [Remove](#)

**Unemployment Claims Process** 

Unemployment claims process management system  
Last modified by P8Admin on September 12, 2010

**Law Enforcement** 

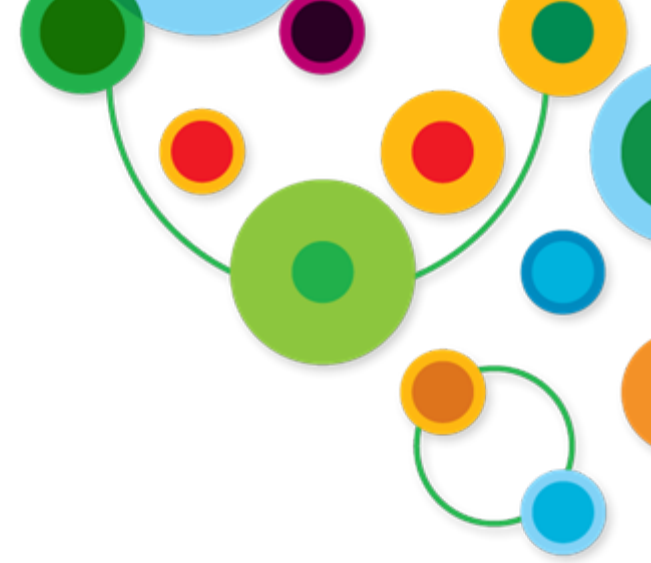
Law Enforcement management solution  
Last modified by P8Admin on September 12, 2010 

**Credit Cards JGD v2** 

description  
Last modified by P8Admin on September 10, 2010

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# Business benefits

- Better business and IT collaboration to define solutions
  - New Case Builder bringing case asset definition into a single place
- Faster build and deploy times via better tools and solution templates
  - Deploy to sandbox from Case Builder
  - Packaging of a solution into a simple, repository-independent structure
- Delivering complete case context for case workers with ability to collaborate within case teams
  - Case Object Model, Out of the box runtime, Customizable widget approach
- Optimizing case outcomes thru business rules, cross case analytics, monitoring, and collaboration
  - Integration of ILOG, ICA and Cognos RTM, SameTime

# Thank You!

