

IBM Cúram Social Program Management



Getting Started With IBM Cúram Universal Access Entry Edition

Version 6.05

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Note

Before using this information and the product it supports, read the information in "Notices" on page 11

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Chapter 1. Introduction

1.1 Purpose

The purpose of this document is to provide a quick start guide to configuring IBM Cúram Universal Access Entry Edition. Universal Access Entry Edition offers a fully-configurable, citizen-facing application that enables agencies to provide a user-friendly and intuitive web self-service solution. A citizen can screen themselves to determine their eligibility for the programs offered by the agency, and then proceed to apply for those programs as required. The citizen can create a citizen account to track the status of their screenings and applications, gain access to other information that is relevant to them or to submit details about significant events that may occur in their lives.

1.2 Audience

This guide is intended for individuals who are responsible for configuring the IBM Cúram Universal Access Entry Edition components.

1.3 Prerequisites

There are no reading prerequisites, however the Cúram Universal Access Guide and the Cúram Universal Access Configuration Guide provide additional detail on many of the features described in this document.

1.4 Chapters in this Guide

The following list describes the chapters within this guide:

Online Screening

Online screening allows a citizen to determine if they are potentially eligible for one or more programs provided by the organization. This chapter outlines how to configure a screening and associated programs.

Online Application

Universal Access allows a citizen to apply for programs from the Universal Access portal. This chapter outlines how to configure an online application and associated programs.

Citizen Account

The Citizen Account is a facility within Universal Access that allows the citizen to login to a secure area where they can screen for programs, apply for programs and receive other information relevant to them. This chapter outlines how to configure the Citizen Account.

Life Events

A life event is a significant event that occurs in a citizen's life which may result in a series of interactions between the citizen and the agency. This chapter outlines how to configure a life event.

Chapter 2. Setting up an Online Screening

2.1 Introduction

Online screening allows a citizen to determine if they are potentially eligible for one or more programs provided by the organization. Screening involves asking the client a series of targeted questions which will be used to determine if they are potentially eligible to receive certain programs. This can result in a significant time saving for the citizen as they will not need to complete lengthy application forms for programs they are unlikely to be eligible to receive. The questions are presented to the citizen via a structured group of web pages, known as a question script, that are accessed from the Universal Access portal. The answers that the citizen provides to these questions are then submitted to a database from where they are fed into a business rules engine to be assessed by pre-defined rules logic. These rules make a determination on the citizen's provided data and return a list of programs for which they may either be eligible or not eligible.

The citizen may then proceed to apply for various programs online, or, they may also download a PDF program application form which they can print off, complete manually and mail to their local office.

Before configuring a screening, an organization needs to consider the programs to be included in the screening, what questions need to be asked, how these questions are structured in the script and the business rules that determine whether or not the citizen is potentially eligible for the screened programs. They should also consider if PDF application forms are going to be provided for each program, whether programs will only be available at certain local offices and if service areas will be set up to be serviced by these offices. In order to make a screening question script available on the Universal Access portal, the organization must configure a screening object from the Universal Access menu in the Administration Application.

This chapter outlines how to configure a screening and associated programs.

2.2 Creating a Question Script & Schema

A screening question script contains the questions that will be presented to the citizen via the Universal Portal portal. The organization should prepare the questions for the script up-front, before defining a screening. The answers to the questions will be stored as data attributes in the system. While composing the questions, the organization should also consider the data types of these attributes. Once the questions and data types have been defined, a question script and data schema can be configured for the screening.

To create an IEG question script and schema respectively, the Question Script and Schema fields in the New Online Screening modal should be completed. On saving the record, an empty template for both the script and schema will be created by the system. It will then be possible to update these from the Screening tab by selecting hyperlinks provided on the page. Clicking on the 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.

Question scripts and data schemas are created using Cúram Intelligent Evidence Gathering (IEG). For more information on IEG see the Working with Intelligent Evidence Gathering (IEG) guide.

2.3 Creating an Eligibility Ruleset

After the organization has finalized the question script and schema, business rules logic must be defined to analyze the answers provided to the questions. This analysis will make a determination on whether the citizen is potentially eligible to apply for available programs or not. The system inputs the answers to the question script into the Cúram rules engine, which then runs the defined business rules logic against

the data. The output of this process is a list of programs that the citizen may be either eligible or ineligible for. The results are displayed on the Am I Eligible page of the Universal Access portal.

Business rules are written using Cúram Express Rules (CER). The CER rules can be designed to provide detailed explanatory text to help the citizen understand the decisions regarding potential eligibility. To create a CER ruleset for the screening object, the Ruleset field in the New Online Screening modal should be completed. On saving the record, 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 CER rules see the Working with Cúram Express Rules guide.

2.4 Configuring Online Screening Programs

The organization must define what programs will be made available for online screening. Programs can be added to the system via the Universal Access section of the Administration Application. Any configured program can be associated with a screening. Once configured, a program is available for addition to the screening via a row action on the Screenings list page.

A PDF form can also be defined for a program which enables a citizen to print a paper application form for the specified program, and either post it to the agency, or, bring it in person to a local office. The local office to which the application can be made may also be defined for the program and service areas can be configured to which local offices are assigned to cover. The PDF application forms and local office information are available to the citizen on the Your Next Steps page at the end of the screening process.

For further information on configuring programs, PDF forms, local offices and service areas see the Universal Access Configuration Guide.

2.5 Defining an Online Category for a Screening

An online category must be defined in order to allow screenings (and online applications) to be displayed in the Universal Access portal. Online categories are used to group screenings and online applications into relevant categories defined by the organization. A Name must be specified for the online category. This will be displayed as a heading on the Select Screening page under which the associated screenings will be listed.

Chapter 3. Setting up an Online Application

3.1 Introduction

Universal Access allows a citizen to apply for programs from the Universal Access portal. The online application can be made from the results page of a previous online screening determination or directly from the Universal Access portal home page. The online application process involves asking the client a series of targeted questions on their personal details, income, expenses, employment, education etc. so that this data can be later used as evidence on the agency's eligibility system to determine the citizen's eligibility for the programs being applied for. The questions are presented to the citizen via a structured group of web pages, known as a question script, that are accessed from the Universal Access portal. The answers to these questions are then submitted to a database from which the agency can later extract and use the data to determine program eligibility.

Once the citizen has applied they can log back into the Universal Access portal using their account details (if they have chosen to set up a Citizen Account) and check on the status of their online applications.

Although Universal Access promotes the use of the online method of application, the solution also provides the facility for organizations to allow citizens to make a traditional paper application as an alternative. On completion of a question script, the citizen can open a PDF form that is pre-populated with the answers they have provided, print it off and submit it manually to the agency.

There are a number of steps to configuring a Universal Access application. Before configuring an online application an organization needs to consider the programs to be made available for application, what questions need to be asked and how these questions are structured in the script. They should also consider if PDF application forms are going to be provided for each program, whether programs will only be available at certain local offices and if service areas will be set up to be serviced by these offices.

This chapter outlines how to configure an online application. It will detail the programs that will be available to apply for on that application, the associated service areas, local offices and PDF forms that can be configured for the application.

3.2 Creating a Question Script & Schema

An online application question script contains the questions that will be presented to the citizen via the Universal Access portal. The organization should prepare the questions for the script up-front, before defining an online application. The answers to the questions will be stored as data attributes in the system. While composing the questions, the organization should also consider the data types of these attributes. Once the questions and data types have been defined, a question script and data schema can be configured for the online application.

To create an IEG question script and schema respectively, the Application Script and Script Schema fields in the New Online Application modal should be completed. On saving the record, an empty template for both the script and schema will be created by the system. It will then be possible to update these from the Applications tab by selecting hyperlinks provided on the page. Clicking on the 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.

Question scripts and data schemas are created using Cúram Intelligent Evidence Gathering (IEG). For more information on IEG see the Working with Intelligent Evidence Gathering (IEG) guide.

3.3 Configuring Online Application Programs

The organization must define what programs will be made available for online application. Programs can be added to the system via the Universal Access section of the Administration Application. Any configured program can be associated with an online application. Once configured, a program is available for addition to the online application via a row action on the Applications list page.

A target system must be specified for a program. This specifies the external (or remote) system that the program application will be sent to for processing. Remote systems can be configured from the Remote Systems link in the Universal Access administration menu.

A PDF form can also be defined for a program which enables a citizen to print a paper application form and either post it to the agency, or, bring it in person to a local office. The local office to which the application can be made may also be defined for the program and service areas can be configured to which local offices are assigned to cover. The PDF application form and local office information are available to the citizen on the Print Your Application? page available to access at the end of the online application process.

For further information on configuring programs, PDF forms, Remote Systems, local offices and service areas see the Universal Access Configuration Guide guide.

3.4 Defining an Online Category for an Application

An online category must be defined in order to allow online applications (and screenings) to be displayed in the Universal Access portal. Online categories are used to group online applications and screenings into relevant categories defined by the organization. A Name must be specified for the online category. This will be displayed as a heading on the Select Application page under which the associated applications will be listed.

3.5 Defining Online Application Configuration Properties

There are some important system properties which control various aspects of online application including when a citizen should authenticate themselves on the system. Some useful properties are listed below. For information on the remaining system properties see the Universal Access Configuration Guide.

- The agency can configure the system to specify whether, before starting an application, a citizen must mandatorily 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 the Universal Access portal before starting an application. If this is switched off, the citizen will be taken directly to the application selection page.
- The agency can configure the system to specify whether, before applying, a citizen can optionally decide 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 the Universal Access portal before starting an application. If this is switched off, the citizen will be taken directly to the application selection page.
- The agency may wish to mandate that a citizen mandatorily logs in before they submit an application. The system property `curam.citizenworkspace.intake.submit.intake.mandatory.login` is 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.
- A citizen may withdraw the application for any of the programs they have applied for. When withdrawing a program application, a withdrawal reason must be specified. Withdrawal reasons are defined for a particular application in the Intake Application section of the Universal Access Administration Application. Before associating a withdrawal reason with an application, withdrawal reasons must be defined in the `WithdrawalRequestReason` code table.

Chapter 4. Setting up the Citizen Account

4.1 Introduction

The Citizen Account is a facility within Universal Access that allows the citizen to login to a secure area where they can screen and apply for programs. The citizen can also view information relevant to them, including individually tailored messages, system-wide announcements, updates on their payments, contact information for agency staff and Outreach campaigns that may be relevant to them.

This chapter outlines how to configure the Citizen Account. Before configuring a Citizen Account the organization should consider what kind of individual messages they wish to make visible to the citizen regarding their interactions with the agency. They should also decide on any system-wide announcements they want to make available to all citizens on logging into their account. The organization should decide how much information on agency personnel they wish to expose to the citizen. Any Outreach campaigns that may benefit the citizen should also be identified.

4.2 Adding Account and System Information Messages

The messages section of the Citizen Account homepage displays information messages to the citizen that relate to their interactions with the agency. An organization should consider what types of messages they wish to make available to the client in the messages area. There are two types of messages that can be displayed in the messages panel; Account Messages and System Messages.

- Account messages are specific to the citizen using the account. Account message data is provided from external systems via a web-service. To make an account message available for display a new type for the message should be added on the Account Messages list page. A new Name, Description and Icon can be added for the message type. Once the organization has entered their message types they can be enable/disable and reordered. Enabling/disabling a message type toggles whether the message type will be displayed in the messages list. The order of the message type determines where it is shown in the list.
- System messages are used when the organization wants to send messages to all citizens who have a citizen account. A new system message can be added from the System Messages list page. A new Title, Message (content), Effective Date and Expiry Date can be added for the message.

4.3 Enabling the Display of Agency Worker Information

The citizen account provides the citizen with the ability view information about agency workers who they are dealing with. An organization needs to consider if they wish to make any agency worker information available to the citizen. This information is available on the Contact Information page within the Citizen Account. The following system properties are provided to configure whether agency worker contact information is displayed to a citizen and if so, what specific information should be exposed.

- `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.

4.4 Configuring Outreach

Outreach allows agencies to define citizen information campaigns for display in the Citizen Account. Campaigns are targeted pieces of information displayed on the Citizen Account homepage which are populated by harvesting existing information that the agency possesses about the citizen. They consist of a title, a corresponding image and information text with an optional embedded hyperlink, all of which are populated from the results of a business ruleset execution. The business ruleset and the image used by the campaign are configured from the Outreach section of the Universal Access Shortcuts menu. The business rules can be defined using the Cúram Express Rules (CER) Editor. For more information on writing CER rules see the Working with Cúram Express Rules guide.

Chapter 5. Setting up a Life Event

5.1 Introduction

A life event is a significant event that occurs in a citizen's life which may result in a series of interactions between the citizen and the agency. Examples of life events include marriage, the birth of a child or a death. Universal Access provides an organization with the capability to collect information on the citizen relating to a life event. It does this by presenting the citizen with a structured group of web pages, known as a question script, which is accessed from the Universal Access online portal. By answering these questions the citizen can report this life changing event which may impact the programs and services that the citizen is receiving, or is due to receive.

In addition to collecting information on the citizen's situation, the life event can also be configured to provide useful resources to the citizen. For example, a Finding a Job life event might include links to job seekers websites and tips on how to write resumes and effective cover letters.

In order to make a life event available on the Universal Access online portal, the organization must configure a life event object from the Universal Access menu in the Administration Application. There are a number of steps to configuring a life event, an organization needs to consider what data needs to be captured and any information they wish to make available on the life event.

This chapter outlines how to configure a life event.

5.2 Configuring a Life Event Name and Display Name

A name must be specified and uniquely identified for the life event. This name is only displayed in the Administration Application. A display name must also be configured and this is the name of the life event that will be displayed to the citizen in the Universal Access portal. To configure the name and display name respectively, the Name and Display Name fields on the New Online Life Event modal should be completed.

5.3 Creating a Question Script & Schema

A life event question script contains the questions that will be presented to the citizen via the online portal. The organization should prepare the questions for the script up-front before defining a life event. The answers to the questions will be stored as data attributes in the system. While composing the questions, the organization should also consider the data types of these attributes. Once the questions and data types have been defined, a question script and data schema can be configured for the life event.

To create an IEG question script and schema respectively, the Question Script and Schema fields in the New Online Life Event modal should be completed. On saving the record, an empty template for both the script and schema will be created by the system. It will then be possible to update these from the Life Events tab by selecting hyperlinks provided on the page. Clicking on the 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.

Question scripts and data schemas are created using Cúram Intelligent Evidence Gathering (IEG). For more information on IEG see the Working with Intelligent Evidence Gathering (IEG) guide.

5.4 Creating an Answer Script

A life event answer script is another type of script that can be configured in addition to the question script. An answer script allows the citizen to review answers provided to questions in a previously submitted life event. The Universal Access online portal displays previously submitted life events in a list on the Submitted Life Events page. In order to view the answers in this list, an answer script must be specified. This will activate a hyperlink on the Submitted Life Event list row allowing the citizen to review their answers.

To create an IEG answer script, the Answer Script field in the New Online Life Event modal should be completed. On saving the record, an empty template for the script will be created by the system. It will then be possible to update this script from the Life Events tab by selecting a hyperlink provided on the page. Clicking on the script link will launch the IEG Editor which will allow the answer script to be edited.

Answer scripts are created using Cúram Intelligent Evidence Gathering (IEG). For more information on IEG see the Working with Intelligent Evidence Gathering (IEG) guide.

5.5 Configuring an Image for a Life Event

An image can be configured for each life event. The image will be displayed to the left of the life event on the list page. An image for a life event is configured by selecting the New Image row action on the newly created life event. A modal window launched prompting the user to select the image, enter a name and alternative text.

5.6 Configuring a Remote System for a Life Event

If a life event is used to collect data from the citizen, a remote system and associated life event web-service must be defined in order to transmit the life event data to the relevant agency. For further information see the Universal Access Configuration Guide.

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