

IBM Cúram Social Program Management  
Version 7.0.5

*Cúram Universal Access Guide*



**Note**

Before using this information and the product it supports, read the information in [“Notices” on page 30](#)

**Edition**

This edition applies to IBM® Cúram Social Program Management v7.0.5 and to all subsequent releases unless otherwise indicated in new editions.

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# Chapter 1. Universal Access business overview

A business overview of the online facilities that are provided by the optional IBM Cúram Universal Access (UA) application module. Use this information to map existing features and capability to your business requirements during a business analysis.

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## Universal Access overview

An overview of the need for citizens to be able to access services and programs online and how Universal Access meets this need. Universal Access is a fully configurable online citizen-facing application that enables agencies to offer a web self-service solution to their citizens. Universal Access can provide a greater number of citizens with access to programs and services by allowing citizens to complete key tasks on the web without the assistance of a worker.

### The Needs of Citizens: What is Required of the Agency

As web access becomes faster and more available, enterprises are offering innovative, customer-service solutions via the Internet. These solutions are often referred to as web self-service. They allow customers to access specific information and perform routine tasks without requiring any interaction with a representative of the enterprise.

Agencies are particularly interested in these developments. Agencies face a unique challenge in communicating with, and providing many complex offerings to, a large number of citizens who have had no previous interaction with the agency. This can affect the relationship between the agency and the citizens who want to avail of their services.

### Using Web Self-Service to Help Citizens

A web self-service solution can help to address these issues. However, most agencies will have demanding requirements for the citizen-facing applications that form the basis of such a solution. Given the diversity of the benefits and services that agencies offer - child care, income support, medical cover and so on - it is important that the solution provided is fully configurable and has a consistent and clear navigation so that citizens can easily find, understand and apply for the services and benefits they need without requiring the help of an agency worker. Ideally, any configuration changes should not require modifications to the source code, as this can be a time consuming process.

IBM Cúram Universal Access (UA) meets these requirements by allowing citizens to interact with an agency over the Internet. UA is a fully-configurable, citizen-facing application that enables agencies to provide a web self-service solution.

### How Does Universal Access Meet This Need?

Using UA, citizens can perform key tasks without the intervention of an agency worker:

#### **Triaging a citizen to determine their needs**

A citizen can answer a short set of questions to quickly identify services in their community or government programs which might meet their needs.

#### **Screening a citizen for programs**

A citizen can screen themselves, to determine their eligibility for the programs offered by the agency.

#### **Facilitating citizen application submissions**

A citizen can apply for programs and track the status of any applications they have made.

#### **Managing client applications and life events: The Citizen Account**

A citizen can report a life event, such as the birth of a child, marriage, or a change in employment as these changes might affect the benefits or programs they are receiving. UA also provides a Citizen Account which provides citizens with a fast and convenient way to securely perform screening,

applications and triage as well as providing access to payment information, scheduled activities, in progress and submitted applications and agency worker contact information.

The citizen is also provided with information representative of their particular circumstances in the form of messages and outreach. The messages displayed aim to predict why the citizen has logged in, for example, messages are displayed informing the citizen of their latest payment amount and their next payment date. Outreach allows for information, in the form of text, links and images, to be displayed that might help the citizen. For example, if a citizen has reported that she has just had a baby, information on applying for a birth certificate or information on child care could be displayed. Additional information can be added to the citizen account if the agency deems it appropriate to share more information with the citizen.

### **Appeals**

Optionally, a citizen can submit a request for appeal from their citizen account.

## **Determining the Best Course of Action for a Citizen**

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An overview of how a citizen can use triage to quickly identify community services and government programs that meet their needs. Citizens who have little or no interaction with an agency can find it difficult to identify the services and programs that they can avail of to meet their needs. UA provides a triage process that can be used to quickly identify a citizen's needs and can direct them to community services and government programs.

For example, a client might have an immediate need for food and shelter for his or her family. Triage will quickly identify these needs and provide details of suitable services, service providers and programs to help meet those needs.

A citizen can perform triage at any point in time but is normally used when a citizen has an emergency need and they are not familiar with the services and programs they can avail of i.e. It might be their first interaction with an agency. Citizens who have had previous interactions with an agency and are aware of how their needs can be met might screen or apply for programs.

This chapter outlines the features of triage in UA which allows citizens to quickly identify services and programs to meet their needs.

### **How does Triage Work?**

UA provides infrastructure to allow an agency to configure a set of questions which can be presented to the citizen and aims to capture information about the citizen's situation. It is recommended that this question script contains a short set of questions so that the citizens basic needs can be quickly identified. Based on the answers provided to these questions, services and programs that might meet the citizens needs are displayed. Triage is initiated by selecting the Government and Community Help option on the UA home page and choosing Find Community Help. The citizen is then presented with a set of questions.

#### **Capturing Client Information with Triage Scripts**

The information is captured using a question script defined by the agency. A system property is provided which specifies the script to display. The question script is created using Cúram Intelligent Evidence Gathering (IEG). With IEG, information is gathered interactively by displaying a script of questions that the citizen can answer. A sample question script might ask questions about the client's basic needs - Food/ Shelter, Finance, Physical Health/Disability and Mental Health/Substance Abuse.

When the citizen has provided answers to all of the questions in the script, the results are displayed to the citizen.

#### **Displaying Triage Results**

Based on the answers the citizen provides, a list of community services and government programs are displayed to the citizen that might meet their needs. A textual alert can also be displayed highlighting important information to the citizen. These results are derived by using Cúram Eligibility Rules (CER) that run when the citizen has completed the question script. A system property is provided which dictates the rule set to execute for Triage. The results of the triage are displayed on the screen to the citizen. Available

services are displayed on the left side. Providers of these services are displayed on Google Maps and are represented by icons. On the right side, a list of applications and screenings are displayed. Alerts are displayed at the top of the page. For more information, see [“Working with the Results of Triage” on page 3.](#)

## Working with the Results of Triage

Triage results provide a citizen with access to information on service providers and government programs and allows a citizen to easily identify the location of service providers, get directions to providers locations and to screen or apply online for government programs. This section describes triage results in more detail.

### Mapping Provider Locations

When the results page first opens, a number of services might 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 might confuse the citizen. A 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. Note: The user is not prevented from selecting more than 10 services.

In order for the map to display providers specific to an agency's and a citizen's location, a number of configuration settings are provided which dictate the area of the map to display initially, for example, a configuration setting is provided which will allow an agency to define a central point which means that the map will open at this central point.

A zoom level can also be configured which dictates the zoom level of the map when the results page is initially displayed. Setting the zoom level is important as it dictates whether the icons representing the providers are visible or not - setting it too high will show a very large area, a state for example, means that the icons representing providers are not displayed. A citizen will not be able to identify service providers unless they manually zoom in. Setting the zoom level at a low level will mean that only a small number of providers are visible making it difficult for a citizen to see all providers close to them.

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. The search is supported by a configuration setting known as the geocoding bias which dictates the north/south/east/west boundaries of the map to display when a citizen searches for a location. This is useful when a citizen searches for a location that might exist in multiple locations on the map. For example, there are a number of towns called 'Springfield'. The geocoding bias dictates which 'Springfield' to display. Additionally, providers whose addresses are located outside of the boundary defined by the bias are not displayed on the map.

The following table outlines how the map reacts to various actions performed by a citizen:

| <i>Table 1: User interactions with the map</i>          |   |
|---|---|
| <b>Citizen Action</b>                                   | <b>Map Reaction</b>   |
| Citizen specifies a location that cannot be found       | The map does not change but a message is displayed to the citizen indicating that their location cannot be found.                                       |
| Citizen specifies a location that can be found          | Icons for service providers are displayed when the location entered brings the map to a zoom level which allows provider icons to be visible.           |
| Citizen specifies a location that exists multiple times | The map does not change but a message is displayed to the citizen indicating that they need to refine their search by specifying the state or ZIP code. |

| <i>Table 1: User interactions with the map (continued)</i> |   |
|--|---|
| <b>Citizen Action</b>                                      | <b>Map Reaction</b>   |
| Citizen zooms out  | If the citizen zooms out past the zoom level at which icons can be displayed, the icons will disappear. A message will be displayed to indicate that they need to zoom in to see the service providers. |
| Citizen drags the map to the left and right, up and down.  | Additional service providers are displayed if appropriate.  |

## **Related concepts**

### Configuring Triage

#### **Viewing Provider Details**

To allow a citizen to choose a provider which best suits their need, additional provider information is provided. This information is accessed by selecting the appropriate icon on the map. Provider details are displayed to a citizen i.e. Contact information, a map showing the providers location, and information that might be relevant to the citizen, for example, the documents a citizen might need to bring to a provider to receive a service.

The following table describes each of these areas:

| <i>Table 2: Provider Details</i> |   |
|----------------------------------|---|
| <b>Information</b>               | <b>Description</b>  |
| Service Information              | The name and description of the service.  |
| Contact Information              | The providers name, address, phone number, email address and website are displayed. Important client information is also shown here, for example, opening hours. This is recorded as Client Information in Cúram Provider Management (CPM).   |
| Other Services                   | Additional services that the provider provides are listed.  |
| Specialties                      | Provider specialties are areas of provider expertise or experience, for example, they might be Spanish speaking or they might work with disabled citizens.  |
| Intake Procedure                 | Providers might have a specific intake procedure, for example, the client might have to go into the providers office to apply rather than applying online.  |
| Eligibility                      | In order to receive a particular service from the selected provider, there might be eligibility criteria, for example, the client might need to be over 18.   |
| Accreditations                   | An accreditation is a certification of competency provided by third parties which states that the provider is meeting their formal standards required to deliver a service. For example, the National Association of Child Care Professionals is a third party which gives accreditation to child care providers for their early care programs. |



| <i>Table 2: Provider Details (continued)</i> |   |
|--|---|
| <b>Information</b>                           | <b>Description</b>  |
| Fees   | The amount of money a citizen might have to pay to receive the service.   |
| Areas Served                                 | The provider might only serve particular areas within a city/region.  |
| Documents Needed                             | The citizen might need to bring documentation in order to receive a service from a provider, for example, a birth certificate or drivers license. |

For information on configuring provider details see the [Cúram Provider Management Business Guide](#).

The provider details page also allows a citizen to print the providers details, get directions to the providers location and also to contact the provider using the Refer Me link.

### ***Getting Directions***

To view and print directions from a citizen specified location to the providers locations, the Get Directions link can be selected. A citizen can specify their starting location and can also choose the mode of transport that they will be using. Based on their selection, walking or driving directions will be provided. The unit of distance can also be specified i.e. Miles or kilometers. A citizen can print these directions inclusive of the map.

### ***Referring a Citizen to a Provider***

The citizen might want to contact the provider to inform the provider that they are interested in the service and might want to avail of it. To do this, the Refer Me link can be selected which allows the user to specify their contact details and to write a message which will be sent by email to the provider. A configuration setting is provided in CPM to dictate if a provider allows for this type of referral to be sent to them.

For information on configuring provider details see the [Cúram Provider Management Business Guide](#).

### **Displaying Alerts**

Based on the answers provided by a citizen it might be necessary to alert them to important information, for example, if a citizen has answered a question which indicates that they are in danger of physical abuse the contact number for emergency services might be displayed. To cater for this, alerts can be defined in the triage rule set and subsequently displayed on the triage results page. Multiple alert messages can be displayed on this page if necessary.

### **Screening or Applying for Programs from Triage**

As well as providing a citizen with details of community services that meet their needs, government programs are also provided. From the triage results page, a citizen can screen or apply for a number of government programs that might meet their needs. Depending on the answers provided by the citizen in the question script, the CER rule set will identify and display one or more screenings and applications which will enable a citizen to identify if they are eligible and subsequently apply for one or more government programs. Applications and screenings might contain multiple programs within them. The CER rule set can also identify specific programs within the screenings and applications that might meet the clients needs i.e. When a screening or application is selected from the triage results page, some or all of the programs within the screening and application can be preselected.

For more information on screening and applications see [“Screening a Client for Programs and Services” on page 6](#) and [“Completing and Submitting Client Applications” on page 8](#).

## Screening a Client for Programs and Services

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An overview of screening, including the two types of screening that can be performed by a citizen, filtered and eligibility screening. Screening for eligibility allows a citizen to determine if they are potentially eligible for one or more programs based on a short set of guided questions and a short set of eligibility rules. Based on this determination, the client can decide whether to apply for the programs identified.

### Screening Types

Two types of screening are supported by UA – filtered screening and eligibility screening. Filtered screening is used to reduce the number of programs for which a citizen might want to screen. For example, a particular type of screening might screen for 50 programs. However, there are some basic questions (e.g., are you married, are you pregnant), gathered using an IEG script, that can be used to quickly identify programs for which a citizen is unlikely to be eligible.

Eligibility screening typically involves collecting answers to several more detailed questions (using an IEG script), so the set of guided questions is longer. Typical questions defined in the script relate to a person's resources (savings, stocks, bonds, and so on) or household circumstances. By performing filtered screening first, a citizen can avoid answering such questions. That is, they can be informed of the programs for which completing full eligibility screening is likely to be most beneficial.

The results of filtered and eligibility screening – the programs for which a citizen might be eligible – are generated by running screening rules against the answers to the various questions. The citizen is then presented with the option of submitting an application for these programs. However, they can submit an application directly, without having to undertake screening first.

UA supports both anonymous and authenticated screening. Authenticated citizens (citizens who have created an account) might choose to save a particular screening session. This screening might be resumed at a later time. As the citizen progresses through the script, information that is entered on the previous page is automatically saved each time the citizen clicks **Next** in the IEG script. This prevents the loss of the screening information in the event of a timeout or the accidental closure of the browser window. Each in-progress screening can be resumed or deleted from the **My Screening** list page if required.

A system property is provided which dictates whether screenings are automatically saved. By default, this property is enabled.

### Screening Selection

The screening process is initiated when the citizen selects Find Government and Community Help on the UA home page and choosing Check If You are Eligible for Government Benefits. The agency can configure the system to specify whether, before screening, the citizen can choose to be authenticated or not. If authentication is enabled, it means that the citizen might choose to be authenticated before proceeding with screening. If authentication is disabled the citizen will be taken through the screening process without being asked to log in or create an account.

Choosing to create a new account will bring the citizen to an account creation screen. Upon successful creation of the account, the citizen is automatically logged in to the system and the screening process proceeds.

If the citizen elects to log in, upon successful login, the system will check if the citizen has an existing saved screening. If the citizen has a saved screening a page is displayed listing the screening that the citizen previously saved. The citizen can choose to start a new screening or resume the saved screening.

In order to continue with the screening process a screening must be selected. Depending on how the system is configured, the citizen can manually select the screening or the system will automatically select the screening. The system will automatically select the screening if only a single screening has been defined. However, if more than one screening has been defined, the citizen must select the screening that they want to undertake.

This screen lists and describes each of the screenings that are available on the system. UA allows screenings to be grouped together into categories, e.g. Health & Human Services, Unemployment Services etc. Screenings are presented to the citizen in these categories in order to make it easier to find the required item. The screenings, and their categorization, are defined in the UA administration.

An individual screening might allow a citizen to screen for one or more programs. Typically a citizen will be asked to select the programs for which they would like to be screened. However, there are three situations when the citizen will not be asked to select programs:

- If filtered screening has been defined for the screening. The citizen will however be asked to choose the programs they would like to be screened for once filtered screening has been completed.
- If a single program has been defined for the screening.
- If a screening has been configured not to allow program selection by a citizen.

Once the citizen has selected the screening and the programs for which they would like to be screened. The system invokes the associated IEG script allowing the citizen to start the selected screening.

### **Related concepts**

#### Configuring Screenings

## **Determining the Most Suitable Programs for a Client**

Filtered screening can be used to identify the most suitable programs for which a citizen might want to screen. By using filtered screening before eligibility screening, the citizen can be informed of the programs for which completing full eligibility screening is likely to be most beneficial.

Filtered screening is defined for a screening by specifying a filter script and rules. Typically a script for filtered screening should not be more than one or two pages in length. The objective is to enable the citizen to quickly determine the programs for which proceeding with eligibility screening is likely to prove most beneficial. If filtered screening has been defined, the citizen is brought immediately to the filtered screening script upon selection of the screening. The citizen is not asked to select programs. The rules are therefore executed for all programs defined in the filtered screening rule set.

The screening results page lists the programs that the citizen might be entitled to receive and those for which eligibility could not be determined. The latter list represents the programs that the citizen will not be eligible to receive, however the citizen is not prevented from proceeding with an application for these programs. The citizen can choose the programs for which they would like to proceed with eligibility screening from either list. Only programs that have been explicitly added to the screening in UA administration might be selected.

## **Screening for Potential Client Eligibility**

Eligibility screening is used to determine a citizen's potential eligibility to receive a particular program or programs. It consists of a script to collect data and an eligibility screening rule set to determine the citizen's potential eligibility for one or more programs.

The eligibility screening rules are executed upon completion of the screening script and the results are displayed on the Am I Eligible page.

The eligibility screening rules are only executed for programs associated with the screening.

The eligibility screening results page is divided into two lists; programs for which the citizen might be eligible and programs for which eligibility could not be determined. The CER rules can be designed to provide detailed explanatory text to help the citizen understand the decisions regarding potential eligibility.

The text displayed in the Am I Eligible page header might be configured for each different type of screening to present a message that is relevant to the screening that has been undertaken by the citizen.

Clicking on the Next button opens the Your Next Step page. This page is divided into three sections; programs that can be applied for online, programs that can be applied for by opening and printing an application form, and programs that can be applied for by calling into a local office. The header text of the Your Next Step page can also be configured for a screening.

### Applying Online for a Program

The Apply Online section lists all of the programs, for which the client elected to be screened, that can be applied for online from UA. The section is not displayed if there are no programs that can be applied for online.

An icon to the left of the program name indicates if the screening has determined that the citizen might be potentially eligible to receive the program. The text describing each program can be configured in UA administration. The text describing the other programs that might be applied for using the same online application is only displayed if there are other programs that can be applied for. Clicking on the Apply Online link opens the Select Programs page if there are other programs that the citizen can apply for using the same online application. The program for which the Apply Online link was selected is automatically selected and an icon is drawn next to the name of any programs for which screening determined potential eligibility. Clicking on the Next button opens the appropriate intake script.

### Applying for a Program by Mail

The Print & Mail section lists each of the programs for which a PDF application form might be opened and mailed to the agency. This section is not displayed if PDF application forms have not been defined in UA administration for any of the programs affected.

Clicking on the application name or PDF icon opens the application form. Data entered during screening might be copied to the application form if a mapping configuration has been defined for the program. The text describing each program is defined in UA administration. The text describing the other programs that might be applied for using the same PDF application is only displayed if there are other programs that can be applied for. The **Where will I mail this to?** link opens a dialog that enables the citizen to find the address of the appropriate office to which the application should be sent. Please see [“Printing an Application” on page 12](#) for more information.

### Applying for a Program in Person

The Local Office section lists all of the programs that can be applied for by visiting a local office. This section is not displayed if no programs can be applied for in this manner.

The **Where is my local office?** link opens the window that enables a citizen to find the address of the local office that handles applications for a particular program. This is the same functionality as that available for PDF application forms. However, in this case, the relationship between a service area and a location must be defined for the program.

For information on configuring screenings see the *IBM Cúram Universal Access Configuration Guide*.

## Completing and Submitting Client Applications

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An overview of the process of submitting and managing client applications. To apply for programs, a client must submit an application, providing required information on personal details, income, expenses, employment, education and so on. This information becomes evidence on the client's case and is used to determine eligibility.

### Starting the Application Process

The application process is initiated when the citizen selects Find Government and Community Help from the UA home page and chooses Apply For Benefits. The agency can configure the system to specify whether, before making an application for benefits, the citizen must be authenticated or not. If authentication is enabled, the citizen must be authenticated before proceeding with application intake. If it is disabled, the citizen might proceed with intake without authentication. If the citizen must be authenticated, the citizen must either create a new user account or log into an existing account before commencing the intake process.

At this point in the process, the citizen has a maximum of three (depending on the authentication configuration) choices that can be made:

- Create a new account
- Log in to an existing account
- Proceed without authentication

Choosing to create a new account will bring the citizen to an account creation screen (for more information please refer to the Chapter 6 Security). Upon successful creation of the account, the citizen is automatically logged in to the system and the intake process proceeds.

If the citizen elects to log in, upon successful login, the system will check if the citizen has any existing applications either in progress (i.e. not yet submitted to the agency) or awaiting disposition (i.e. Submitted to the agency but the agency has not yet processed the application). The lists are only displayed if there are items in the list, i.e. If there are no saved applications, the section containing saved applications is not displayed.

If applications are listed, the citizen is presented with several options depending on the state of a particular application. The citizen might choose to resume or delete an incomplete application, withdraw an application that has been submitted or start a new application. For the purposes of this chapter let us assume that the citizen chooses to start a new application.

## Starting and Selecting an Application

An application can be started by selecting the Start New Application link on the Current Applications page which is opened if the citizen has chosen to log in. If the citizen has created an account and automatically logged in or has chosen not to be authenticated the citizen is brought automatically to the application selection page. In order to continue with the intake process an online application must be selected. Depending on how the system is configured, the citizen can manually select the application or the system will automatically select the application. The system will automatically select the online application if only a single application has been defined. However, if more than one online application has been defined for the system, the citizen must select the online application that they want to complete.

The select applications page lists and describes each of the online applications that are available in the system. UA allows applications to be grouped together into categories, e.g. Health & Human Services, Unemployment Services etc. Applications are presented to the citizen in these categories in order to make it easier to find the required item. The applications, and their categorization, are defined in the UA Administration section of the Cúram Administration Application.

An application might allow a citizen to apply for one or more programs. Typically a citizen will be asked to select the programs for which they would like to apply. However, there are two situations under which the citizen will not be asked to select programs:

- A single program only has been defined for the application.
- Each application can be configured to allow program selection by the citizen or to automatically select all of the programs associated with the application.

The select programs page is displayed if the system has been configured to permit the citizen to select the programs to apply for. This page displays a list of the programs that have been associated with the application. The citizen can select any combination of the programs. For each program, the program name (a link if a URL has been defined for the program) and summary are displayed. The contents of this page are defined using UA Administration.

At this stage, the citizen has selected the application and the programs for which they would like to apply. The system invokes the associated IEG script allowing the citizen to start completing the selected online application.

## Saving an Application

To prevent the loss of application information in the event of a timeout or the accidental closure of the browser window, the application is automatically saved each time the citizen clicks the Next button in the IEG script. On clicking **Next**, the information that was entered on the previous page is saved. Each in-progress screening can be resumed or deleted from the My Applications list page if required.

A system property is provided which dictates whether application are automatically saved. By default, this property is enabled.

When quitting an application, the citizen is given one of four choices depending upon how the intake application has been configured. The citizen can:

- Save the application.
- Send the application to the agency for processing.
- Print the application.
- Exit without saving the application.

This section describes the processing that is undertaken if the citizen opts to save the application.

If the citizen opts to save the application, the save application screen (which allows the client to create an account or to log in) is displayed if the citizen has not already logged in to the system. This screen is skipped if the citizen has logged in already.

The citizen can choose to create a new account or log in to the system. If the citizen logs in to an existing account, the system checks if the citizen has an in-progress (not submitted to the agency) application of the same type. If the citizen already has an application of the same type, a page is displayed giving the citizen the option to keep the existing application and discard the new application, or to delete the existing application and save the new application.

If, as a result of decisions made by either the citizen or the system, the new application is saved, a page is displayed confirming that the application was successfully saved.

## **Resuming an Application**

An application can be resumed by selecting the Continue with Application link on the Current Applications page which resumes the application from the point at which it was last saved. When an application is resumed, the data entered is automatically saved as the citizen moves from page to page through the script. As the data has already been saved, the option to save the script is not presented to the citizen upon exiting the script. The options presented to the citizen depend upon the script configuration.

## **Submitting an Application**

An application might be submitted or sent to the agency upon completion of the intake script or optionally upon exiting a script before it has been completed. An intake application can be configured such that an agency can dictate whether an application script can be submitted before it has been completed or not.

If the citizen chooses to send an application to the agency (by exiting or completing a script), the screen displayed depends upon whether the citizen is already logged in and a property that dictates whether a citizen must either create or log in to an account before submitting the application. If the citizen has already logged in, UA does not prompt the citizen to log in or create an account. However, if the citizen is not logged in, UA prompts the citizen to log in or create a new account. If the property is enabled, the citizen must log in to an existing account or create a new account before the application can be sent to the agency.

If the citizen does not need to identify themselves to the system, and is allowed to send the application to the agency without logging in or creating an account, then an option can be configured to allow the client to do so. This option will not be configured if the citizen is required to create an account or login to an existing account.

If the citizen has logged in to an existing account before sending the application to the agency, the system can determine if the citizen already has an in-progress application of the same type or has previously submitted applications for the same programs that are still pending disposition (awaiting a decision by the agency). In the case of the former, then a page is displayed presenting the citizen with the opportunity to send the new application to the agency or alternatively to keep the saved application, thus discarding the new application.

If the citizen has previously submitted applications for the same programs, the system determines if the citizen can still submit any of the programs to the agency for processing. Programs can be configured to

allow multiple applications to be submitted for the program at any one given time, e.g. a citizen might want to submit a new application for cash assistance for a different household unit than a previous application that they might have submitted that is still being processed by the agency.

This screen alerts the citizen to the fact that whilst application might still be sent to the agency, it cannot be submitted for all of the programs for which the citizen wants to apply. The citizen has three options; continue to submit the application for the programs which the citizen is allowed to apply, save or delete the application.

In order to submit an application to the agency, a submission script must be specified for the application in UA administration. This is required because applications require additional information, which does not form part of the application, to be captured before they can be submitted. For example, a TANF application typically requires information regarding the citizen's ability to attend an interview. This information would not be appropriate for another type of application that does not require an interview to be conducted, e.g. Unemployment Insurance. Electronic signatures are another example of the type of information that would typically be captured using a submission script. This data might not be captured as part of the script, as potentially the citizen can submit before completing the script.

The processing that is undertaken upon completion of the submission script depends upon the configuration of the programs for which the citizen is applying. Program eligibility can be configured such that it might be determined using a Cúram system or a remote system. If Cúram is specified as the eligibility system, an application case creation process is invoked. The application case creation process includes a search and match capability, which attempts to match clients on a new application to registered persons on the system based on configured search criteria. When search and match finishes, one or more application cases are created. Multiple application cases are created if the programs being applied for are configured for different application case types. The application date on the application case(s) is set to today's date if the application was submitted within the business hours of the root location for the organization. If the application is submitted outside of the business hours of the organization, the application date is set to the next business date.

The data entered for the application might be mapped to case evidence tables. The mappings are configured for a particular program using the Cúram Data Mapping Editor. A mapping configuration must be specified for a program in order for the appropriate evidence entities to be created and populated in response to an online application submission.

When the application case has been created, the programs requested by the client are associated with the relevant application case. Some organizations might impose time limits within which an application for a program must be processed - a number of timer configuration options are available for a particular program. These timers are set when a program is associated with an application case. e .

If the eligibility is being determined by a remote system, configurations are provided to allow a web service to be invoked on a remote (non-Cúram) system.

The submission confirmation page is displayed upon successful submission of an application to the agency. This page informs the citizen of the reference number associated with the submitted application. Citizens can use this reference number in any further correspondence with the agency with regard to the application.

The citizen might also open and print a PDF. The actual PDF that is opened depends upon the configuration of the intake application. The application can be configured to use a PDF designed specifically by the agency to be used in conjunction with the intake application, or if no PDF form has been specified a generated generic PDF can be used. If an agency designed form is specified, this form is opened when the citizen clicks the PDF link. The data entered during the online application will be copied to the PDF form for each of the programs, for which the citizen is applying, that have associated mapping configurations of type PDF Form Creation. If a mapping configuration has not been associated with a program, the information entered during the online application for that program will not be copied to the PDF form. If a PDF form is not specified, a generic generated form is opened instead. This form contains a copy of the information entered by the citizen whilst completing the online application.

The agency can define additional information to be displayed on this page. This is typically information that might be required by the citizen in order to help the agency process the application in a timely and

effective manner for both the agency and citizen, for example, proof of identity. This information is configurable for each type of application.

## Printing an Application

UA supports two methods by which a citizen can open and print an application form; the citizen might be directed to a PDF that can be opened, printed and subsequently filled out by the citizen, or the citizen might be taken through a script, which upon completion or exit, the citizen can open a PDF containing the information entered via the script.

PDF forms can be configured such that versions of all languages can be provided. The programs which can be applied for using the PDF form can also be configured.

Each PDF form defined in UA administration is displayed on the **Apply for Benefits** page that is displayed when Apply For Benefit is selected from the UA home page.

Clicking on the form name or PDF icon opens the PDF form. The citizen can also find out where to mail the form by clicking on the link in the **Where To Apply?** column. This link opens a dialog that allows the citizen to enter the ZIP code or county, of the area within which they reside, to find out the address of the local office to which the form should be mailed. A system property is provided which is used to dictate whether ZIP codes or counties are used for this function.

UA administration allows an agency to define service areas. A service area represents a region covered by the counties or ZIP codes that have been associated with the service area. A service area can be associated with a particular local office for a PDF form, i.e. If you reside in this area, send your application form to the office at this address. A default local office can also be defined for a PDF form. The address of this office is returned to the citizen if the system cannot find a local office that has been configured to cover the area in which the citizen resides. In addition, if a working pattern of type Public Opening Hours has been defined for the local office (Cúram location); information on the office opening hours is displayed to the citizen.

A PDF application form might also be opened from an intake script. The script is used to collect the appropriate data. Upon completion of the script (or exit from the script) the citizen is presented with the opportunity to open a PDF form containing the data entered via the script. This is achieved by associating a PDF form with an intake application in UA administration.

The Open my application form link opens the custom PDF form that has been designed specifically for the intake application. The data entered during the online application is copied to the PDF form for each of the programs, for which the citizen is applying. Note: If mapping configurations have not been associated with a particular program, they will not be displayed in the PDF).

If a PDF form and submission script are associated with an intake application, upon completion of the script, the citizen will be asked to send the application to the agency. The option to print the application form will not be presented to the citizen until the submission confirmation page is displayed.

## Withdrawing an Application

Upon successful submission of an application, a citizen might withdraw the application for all or any one of the programs for which the citizen has applied. An application might be withdrawn by selecting the Withdraw link on the Current Applications page. Applications can also be withdrawn from the Applications page in the Citizen Account. See [“Citizen Account” on page 13](#) for more information.

Each program might be withdrawn individually. Clicking on the Withdraw link opens the Withdraw Application page. The program associated with the link, i.e. on the same row, is automatically selected. The reasons for withdrawing the program application can be configured for the intake application in UA administration.

## Deleting an Application

Saved online applications might be deleted. The delete option is available from the Current Applications page. Applications which have not yet been submitted to the agency can be deleted. Applications can also



be deleted from the Applications page in the Citizen Account. Clicking on the Delete link opens a confirmation page.

## Citizen Account

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After clients create a secure Citizen Account, they have access to a range of relevant information, and can track and manage their interactions with the agency in the account.

### Creating an Account and Logging In

A client can create a Cúram Universal Access (UA) account during the screening and application process. To provide the client with access to all of the information available in the Citizen Account, the client first must be registered as a participant on the system of record for example, Cúram.

This record then must be linked to their UA account. Agencies might have various security processes to validate that a Citizen Account user is the same person that is registered on the system. As such, an application programming interface (API) is provided which agencies can use to link their clients. After an agency links a client, the client can log in and has full access to their account.

A standard account also is provided for users who as yet are not linked to a Cúram account. Using the user name and password that is created during the screening and application process, the client can log in and access applications and in progress screenings.

#### Logging In

To log in to the Citizen Account, the client selects to **Login** on the IBM Cúram **Universal Access** (UA) home page. The client is asked to specify a user name and password and then selects **Next**.

The next page that is displayed when the user selects **Login** depends on whether the client is linked to a participant in Cúram and whether second-level authentication is enabled in UA administration. Second-level authentication means that the client is asked to provide more personal information before they are logged in fully, for example, date of birth or Social Security number (SSN). UA allows an administrator to define one or more pieces of data that the client must provide.

If second-level authentication is not defined, the client is brought to the **Citizen Account** home page. If second-level authentication is defined and an administrator specified that date of birth and SSN must be specified by a client before they can log in, then a page is displayed prompting the client to enter their date of birth and SSN.

If the client is not linked to a participant in Cúram, second-level authentication is not applicable. The client is brought to the **account** home page if the user name and password passes authentication.

A forgotten password and reset password capability also is provided. If a client forgets the password, a new password can be requested. If an email address is recorded for the client on the system, an email is sent with a new password. If the client does not have an email address, the secret question answer can be used to reset the password. A client also can reset their password after they log in successfully to the Citizen Account.

#### Related concepts

[Configuring An Authentication Factor](#)

### Citizen Account Home Page

When the client has logged in successfully, the **Citizen Account** home page is opened. The **Citizen Account** home page contains two main sections: **Messages** and **Outreach**.

#### Messages

The **My Messages** section of the **home page** displays messages that aim to predict why the client is logged in. For example, a message can be displayed which informs a client of when their next benefit payment is due or that informs a client of the amount of their last payment.

Messages can be displayed which relate to meetings a client is invited to, activities that are scheduled for a client, applications acknowledgments, and similar. Messages from remote systems also can be

displayed by using web services to transmit the messages. The topics in the **Messages** section describe the characteristics of these messages.

### **Related concepts**

#### Configuring Messages

#### ***Displaying a Message***

Each message has a title, an icon, and an effective date and time that dictates when it gets displayed. In most of cases, the effective date of a message is set to the current date but in some circumstances configuration settings are provided which dictate the effective date.

For example, when a service is scheduled for a client, it might not be appropriate to display the message immediately if the service is scheduled for two months in the future. In this case, a configuration setting is provided to dictate the number of days before the start date of the service that the message needs to appear in the client account. For example, these days are used to populate the effective date. Messages from remote systems are displayed based on the effective date specified in the web service.

#### ***Prioritization and Ordering***

A priority also can be assigned to a message such that it is displayed at the top of the **Messages** listing.

An ordering of messages types also can be configured in Cúram Universal Access (UA) administration. For example, payment messages can be displayed first, meeting messages can be displayed second.

#### ***Duration of Message***

The length of time that the message is displayed depends on the type of message. This duration of a message can be set either by start and end dates or by replacing one message with another.

Some messages relate to items that have start and end dates that can be used to dictate how long the message is displayed. For example, service messages are displayed until the start date of the service has past. In other cases, it might be appropriate for a message to be replaced by another message. A configuration setting is provided which allows the agency to decide whether they want to replace messages in this way or whether they want to define a number of days after which the message is removed. The duration of messages from remote systems is based on the expiry date defined in the web service.

#### ***System Messages***

System Messages also can be displayed. System Messages are used when an agency wants to send a message to all clients who have a Citizen Account.

For example, an agency can use a System Message to alert all users that the system is going to be down on a particular day. System messages can be configured in Cúram Universal Access (UA) administration. An effective date can be defined for a System Message that dictates when the message appears in the Citizen Account. An expiry date also can be specified that dictates when the System Message is to be removed from the Citizen Account.

#### ***Predictive Response Manager***

The Predictive Response Manager (PRM) is the infrastructure that is used to build and then generate and display messages on the **Citizen Account** home page.

A number of default messages are provided and are described in this information along with their associated configurations.

#### ***Outreach***

Outreach campaigns allow agencies to define targeted campaigns that can be displayed in the Citizen Account. The campaigns are based on information that the agency knows about the client.

For example, if the client is unemployed and has a child of school age, information on child care can be displayed that assists the client when they find work.

The right pane of the **Citizen Account** home page is used to display outreach campaigns. This pane displays images, images and text, text with embedded links, and images that can be links. Rich text also is supported.

Outreach campaigns can be configured in the Cúram Universal Access (UA) **Administration** application. Each campaign has an associated Cúram express rules (CER) rule set, which is used to dictate if a campaign needs to be displayed to a client or not. An expiry date also can be specified which dictates the duration of the campaign. A configuration setting also is provided which dictates the name of the **campaigns** pane displayed to a client on the **Citizen Account** home page.

### Related concepts

[Configuring Outreach](#)

## My Payments

The **My Payments** tab lists all payments that are issued to a client. These messages can be retrieved from Cúram or any remote system. Payments that were canceled or expired also are displayed.

A payment can be made by check, electronic funds transfer (EFT), cash, or voucher.

Different details are displayed to the user that depend on the payment type. The following details are displayed for each of the following payment methods:

### Check

Address and Check Number

### EFT

Bank Sort Code and Bank Account Number

### Cash

Address

### Voucher

Address and Voucher Number

## Notices

The **Notices** tab displays a configurable list of communications that are sent either to the client by the agency or sent to the agency from the client. Any type of communication with a status of active is displayed in the list.

The example for type of communications is Pro-forma, Recorded Communications, Microsoft Word communications. A system property dictates the maximum number of communications that might be displayed in the notices list.

Clients can view the description of each communication along with the attachments in the expanded view. Clients can view or save the attachments by clicking the **attachment** link.

Also, in the expanded view is a **Send By Post** option. After this action is selected, the system logs the request to have this communication sent to the client. The request includes communication (ID), Date, Time, and Status. The processing is customizable, which allows customers to add their own logic for how to deal with this request.

## My Activities

The **My Activities** tab displays all activities that are scheduled for the client. Displaying activities helps ensure that a client attends all scheduled activities. Activities include actions, services, and referrals that are scheduled for a client in Cúram. Services, referrals, and actions normally are scheduled for a client in an outcome plan that aims to help a client achieve a particular goal, for example, self-sufficiency.

### Services

Services that have a status of *Not Started* and *In Progress* are displayed. The service name, period, units that remain, a link to the provider details, required participation, and a link to the contact details of the owner of the service are displayed. A link also is provided, which allows a client to submit comments about the service. These comments then can be viewed on the service in the application by a caseworker.

## Referrals

Referrals that have a status of *Active* and a referral date of today or in the future are displayed. The name of the referral and a link to the provider details also is provided. When a referral is created for a client in the application, a referral letter is sent to the client.

This letter also can be accessed from the **My Activities** list. A link is provided, which allows a client to submit comments about the referral. A caseworker then can view these comments on the referral in the application.

## Actions

Actions for which the client is responsible and have a status of *Not Started* or *In Progress* are displayed. The action name, period, participation, and a link to the contact details of the owner of the action are displayed. A link also is provided, which allows a client to submit comments about the action. These comments then can be viewed on the action in the application by a caseworker.

For more information on services, actions and referrals, see the *Cúram Outcome Management Business Guide*.

## Related concepts

[Cúram Outcome Management Guide](#)

## My Applications

The **My Applications** tab lists existing applications that are either in progress (not yet submitted to the agency) or awaiting disposition (submitted to the agency but for which no decision is reached as yet).

This page is the same page as the Current Applications pages described in the **Starting the Application Process** topic. The only difference is that accessing the **My Applications** page from the Citizen Account means that the client is authenticated by the agency as described in **Creating an Account and Logging In** and now has access to other information within the Citizen Account in addition to application information. The client is presented with several options that depend on the state of a particular application.

The client might choose to resume or delete an incomplete application, withdraw an application that was submitted, or start a new application. Starting a new application from the Citizen Account follows the same process as described earlier - the system pre-populates the intelligent evidence gathering (IEG) script with information stored in a client's evidence. This feature prevents a client from having to reenter information that the agency already knows about them. A system property is provided which dictates if the IEG script is pre-populated.

## Starting the Application Process

The application process is initiated when the citizen selects Find Government and Community Help from the UA home page and chooses Apply For Benefits. The agency can configure the system to specify whether, before making an application for benefits, the citizen must be authenticated or not. If authentication is enabled, the citizen must be authenticated before proceeding with application intake. If it is disabled, the citizen might proceed with intake without authentication. If the citizen must be authenticated, the citizen must either create a new user account or log into an existing account before commencing the intake process.

At this point in the process, the citizen has a maximum of three (depending on the authentication configuration) choices that can be made:

- Create a new account
- Log in to an existing account
- Proceed without authentication

Choosing to create a new account will bring the citizen to an account creation screen (for more information please refer to the Chapter 6 Security). Upon successful creation of the account, the citizen is automatically logged in to the system and the intake process proceeds.

If the citizen elects to log in, upon successful login, the system will check if the citizen has any existing applications either in progress (i.e. not yet submitted to the agency) or awaiting disposition (i.e. Submitted to the agency but the agency has not yet processed the application). The lists are only displayed if there

are items in the list, i.e. If there are no saved applications, the section containing saved applications is not displayed.

If applications are listed, the citizen is presented with several options depending on the state of a particular application. The citizen might choose to resume or delete an incomplete application, withdraw an application that has been submitted or start a new application. For the purposes of this chapter let us assume that the citizen chooses to start a new application.

## Client Contact Information

The **Contact Information** tab provides clients with their contact information and contact information of agency workers who are dealing with their cases. Contact information that the agency has on the system for the client is displayed in the Citizen Account.

This information includes a client's address, phone number, and email information. A configuration setting exists that dictates if the client's contact information is displayed here. For example, an agency can configure not to display contact information for the client.

### Related concepts

Configuring Citizen Contact Information

### Client Contact Information

Contact information that the agency has on the system for the client is displayed in the Citizen Account.

Citizen contact information includes a client's address, phone number, and email details. A configuration setting exists that dictates if the client's contact information is displayed on this page. For example, an agency can configure not to display client contact information.

For more information on configuring the display of client contact information, see the *Cúram Universal Access Configuration Guide*.

### Worker Contact Information

Contact information for the agency worker of each case the client is associated with is displayed. Worker contact information from Cúram and remote systems can be displayed. The worker name, business phone number, mobile phone number, pager, fax, and email can be displayed.

A number of configuration settings exist which dictate what gets displayed on the contact information page, for example, an agency can configure not to display agency worker contact information. A configuration setting also is provided which dictates which contact information is displayed, for example, an agency might want to display only a worker business phone number and email address.

For more information on configuring worker contact information, see the *Cúram Universal Access Configuration Guide*.

## Running Triage While Logged in to the Citizen Account

Clients can use triage to identify community services close to them quickly and also easily identify government programs that meet their needs. Triage is the process of quickly identifying a client's needs to direct them to community services and government programs.

A client can choose to run triage while logged in to the Citizen Account. Triage can be initiated by selecting **Find Government and Community Help** and choosing **Find Community Help**. The triage question script is displayed and the client must answer the questions before the **triage results** page is displayed.

As with triage, which is run while not logged in, the system displays applications and screenings that might meet the clients needs. However, when the client runs triage while logged in, the system does not display applications or screenings for programs that the client already is receiving or for which the client has a pending application.

When a client does choose to screen or apply while logged in, the screening and application scripts can be pre-populated based on information already known by the agency. A configuration setting is provided which allows an agency to decide whether screenings and applications scripts are pre-populated or not. Selecting to screen or to apply brings the client to the Screening or Application process.

## Screening from the Citizen Account

Clients can screen themselves to determine their eligibility for government programs. Screening for eligibility allows a client to determine whether they are potentially eligible for one or more programs based on a short set of guided questions and a short set of eligibility rules. Based on this determination, the client can decide whether to apply for the programs identified. Screening can be performed while logged in to the Citizen Account.

Screening can be initiated while logged in to the Citizen Account by selecting the **Find Government and Community Help** and choosing the **Check if You are Eligible for Government Benefits** option or by selecting to screen from the **triage results** page. When screening is initiated, in-progress screenings are displayed (this process occurs if the client starts a screening, exited without completing, and saved the screening), the client can choose either to start a new screening or to resume a previous screening.

Completed screenings are not displayed. If the client has no in-progress screenings, the client is brought directly to a page that allows them to select from a list of screenings.

## Requesting an Appeal

A client might want to appeal a decision made in respect of their application. For example, a client who applied for a benefit and was deemed ineligible, or whose benefit payments were reduced, might not agree with the circumstances that resulted in the reduction and choose to appeal. An appeal can be requested online from the client's account if the client is a participant on a Cúram application or case. A client's Rights of Appeal also are available from the Citizen Account.

On initiation of an appeal request, an intelligent evidence gathering (IEG) script is used to collect information about what the client is appealing, who is appealing, and to capture an electronic signature. On submission of the request, a task is created and assigned to an appeal request work queue and the appeal request is recorded against the client's person record. A PDF file is generated from the IEG script and is stored for caseworker reference as a communication against the appellant in the caseworker application.

A caseworker then can act on the request and either acknowledge the request and continue with the appeal process or reject the request. An acknowledgment or rejection message is displayed in the account of all clients included in the appeal request. A list of submitted appeal requests is provided in the client's account and provides a view of the status of the request.

## Life Events

Changes in a client's circumstances can be reported to the agency by using Life Events, thus quickly determining whether existing benefits are affected. A Life Event is a situation that occurs in a client's life that might result in a series of interactions between the client and the agency, such as death, marriage, or the birth of a child.

Life Events provide an agency with the capability of configuring Life Events that enable a client to report significant life changes that might affect the programs and services that the client is receiving or is due to receive. Life Events also can be configured such that they provide useful resources to the client about a particular Life Event, for example, an option such as **Finding a Job**. Life Events also might include links to job seekers websites and tips on how to write resumes and effective cover letters. Life Events functions are available from the Citizen Account and are described in the following links.

### Related concepts

[Configuring Life Events](#)

### Selecting a Life Event

The Citizen Account provides a client with a list of configured Life Events. A client can select a Life Event by choosing the **My Information** option in the account and selecting **Update My Information**. Common Life Events are displayed first. An agency can specify that a configured Life Event is common in **Cúram Universal Access (UA) Life Event** administration.

A Life Event is considered common if it is an event that might happen frequently in clients' lives. Examples of common Life Events are having a baby, getting married, or changing residence. Displaying a list of

common Life Events aims to prevent the user from having to search from a long list of Life Events to find the information required.

If a client cannot find the required Life Event in the list of common Life Events, a list of all configured Life Events also is provided. Life Events can be categorized in **UA administration** so that a Life Event can be identified easily. For example, changing jobs, income changes, and change of address Life Events might be categorized under **Employment**. If a Life Event is not common or otherwise categorized, it is displayed in a **General** section.

A description of the category and the Life Event is provided so that a client can identify which Life Event provides the information they need. The description of the category and the Life Event is configurable in **UA Life Event** administration.

On selection of a Life Event, a client is brought to a page that provides more information about the Life Event selected. The page also allows the client to submit information to agencies that relates to the selected Life Event.

Life Events also might be informational. That is, they can be used to provide information to the client, such as links to useful websites. This information can be defined in **UA Life Event** administration.

### **Submitting a Life Event**

On starting the Life Event script, the client is presented with a guided set of questions that uses intelligent evidence gathering (IEG) based on the Life Event selected. The question script is defined in Cúram Universal Access (UA) Life Event administration when a Life Event is being configured.

After the details of the Life Event are captured, a client will, if configured for the selected Life Event, be given the option to select the agencies they want the Life Event information to be sent to. This action constitutes the client's consent to send information to the selected agencies. The Life Event can be transmitted to a remote system through a web service or to the relevant case owners on a Cúram system through the evidence broker. The case owner then decides whether to apply them to the client's case.

A client does not need to have a case on the system to submit a Life Event. In that situation, the information that is submitted is not transmitted to a case owner. Instead, it is stored internally and it is up to the agency to decide what to do with this information.

The client is also provided with a list of community services and government programs (according to Triage) based on the life event submitted. This will enable the client to refer themselves for community services or to screen or apply for additional benefits. For example, if the client is already in receipt of Food Assistance and loses his job, he could apply for Unemployment Insurance Benefits. In order to display community services and programs, a rule set must be associated with the life event in administration which will identify the services and programs to display to the client. An alternative configurable results page can also be displayed depending on the rule set defined for the life event.

### **Review Submitted Life Events**

A client is provided with a list of previously submitted Life Events. This list is accessible from the **My Updates** page in the Citizen Account. Information that a client submitted previously through **Life Events** in the Citizen Account also can be reviewed from the **My Information** page.

## **Citizen Account Messages**

The Citizen Account contains several categories of messages that explain to the client procedures in the account process. Use the information in the following links to learn about the message categories and how to configure them.

### **Activity Messages**

Messages in this category are provided for a service, referral, and action.

| Table 3: Service                                      |   |
|---|---|
| Message Area  | Description   |
| <b>Title</b>  | <Icon> Physiotherapy  |
| <b>Message</b> (Frequency and end date not specified) | This service is provided by ABC Provider Inc. Please contact Joe Bloggs at 014567832 or <xref href= "mailto:joe@SemAgency.com" format="other" scope="external"> joe@SemAgency.com</xref> if you need more information. Click <b>My Activities</b> for a full list of your activities. |
| <b>Duration</b>                                       | Message displayed until day after the service start date.   |
| <b>Effective Date</b>                                 | A configuration setting is provided that dictates the number of days before the service start date that the service is displayed.   |
| <b>Notes</b>  | The provider link opens a page displaying provider details. The <b>My Activities</b> link opens the <b>My Activities</b> tab in the citizen account.  |

| Table 4: Referral     |   |
|-----------------------|---|
| Message Area          | Description   |
| <b>Title</b>          | <Icon> Counseling   |
| <b>Message</b>        | You have been referred to ABC Provider Inc. on 22/04/2010. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information. Click <b>My Activities</b> for a full list of your activities. |
| <b>Duration</b>       | Message is displayed until the day after the referral date.   |
| <b>Effective Date</b> | A configuration setting is provided that dictates the number of days before the referral start date that the service is displayed.  |
| <b>Notes</b>          | The provider link opens a page displaying provider details. The <b>My Activities</b> link opens the <b>My Activities</b> tab in the citizen account.  |

| Table 5: Action |   |
|-----------------|---|
| Message Area    | Description   |
| <b>Title</b>    | <Icon> Participate in adult basic education   |
| <b>Message</b>  | This activity will begin on 10/05/2010. Please contact Joe Bloggs at 014567832 or Joe@SemAgency.com if you need more information. Click <b>My Activities</b> for a full list of your activities |



| Table 5: Action (continued) |  |
|-----------------------------|--|
| Message Area                | Description  |
| <b>Message 2</b>            | This activity will begin on 10/05/2010 until 26/07/2010. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information. Click <b>My Activities</b> for a full list of your activities.                    |
| <b>Message 3</b>            | This activity will begin on 10/05/2010 for 3 hours every Monday & Thursday. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information. Click <b>My Activities</b> for a full list of your activities. |
| <b>Duration</b>             | Message is displayed until the day after the action date.  |
| <b>Effective Date</b>       | Current Date   |
| <b>Notes</b>                | The <b>My Activities</b> link opens the My Activities tab in the Citizen Account.  |

### Appeal Request Messages

Messages are provided for an appeal request acknowledgment or rejection.

| Table 6: Appeal request acknowledgment |  |
|--|--|
| Message Area                           | Description  |
| <b>Title</b>                           | Appeal Request Acknowledgment  |
| <b>Message</b>                         | We have received your [Appeal Request - hyperlink to the appeal request on the My Appeals page] and it is currently under review. We will contact you shortly to confirm the next steps. |
| <b>Effective Date</b>                  | Current Date   |
| <b>Duration</b>                        | A configuration property controls how long the message is displayed. The default is 7 days.  |
| <b>Notes</b>                           |  |

| Table 7: Appeal Rejection |   |
|---------------------------|---|
| Message Area              | Description   |
| <b>Title</b>              | Appeal Request Disallowed   |
| <b>Message</b>            | We have reviewed your appeal request and determined it to be an invalid appeal. We will send you written notice of this, including further details. |
| <b>Effective Date</b>     | Current Date.   |
| <b>Duration</b>           | A configuration property controls how long the message is displayed. The default is 7 days.   |

| Table 7: Appeal Rejection (continued) |             |
|---------------------------------------|-------------|
| Message Area                          | Description |
| Notes                                 |             |

### Application Acknowledgment

Messages are provided for an application acknowledgment.

| Table 8: Application acknowledgment |  |
|-------------------------------------|--|
| Message Area                        | Description  |
| <b>Title</b>                        | <Icon> TANF Application Acknowledgment   |
| <b>Message</b>                      | We have received your TANF Application form. The status of this application is pending. We will contact you when the application has been processed.             |
| <b>Effective Date</b>               | Current Date   |
| <b>Duration</b>                     | A configuration setting is provided to allow an administrator to define the number of days (from the effective date) that the message needs to be displayed for. |
| <b>Notes</b>                        | None.  |

### Meeting Messages

Messages are provided for a meeting invitation, a meeting cancellation and a meeting update. A configuration setting is provided which allows an administrator to set the number of days (from the effective date) that meeting messages should be displayed for.

| Table 9: Meeting Invitation  |   |
|--|---|
| Message Area   | Description   |
| <b>Title</b>   | <Icon> Meeting Invitation - Meeting with case worker  |
| <b>Message 1</b> (Not an all day meeting and the meeting start and end date are on the same day) | You have been invited to attend a meeting from 9.00AM until 5.00PM on 12/04/2010 in Meeting Room 1, Block C. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.             |
| Message 2(All day meeting for one day only)  | You have been invited to attend an all day meeting on 12/04/2010 in Meeting Room 1, Block C. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.                             |
| Message 3(All day meeting for multiple days)   | You have been invited to attend an all day meeting each day from 12/04/2010 until 15/04/2010 in Meeting Room 1, Block C. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend. |

| <i>Table 9: Meeting Invitation (continued)</i>   |   |
|--|---|
| Message Area                                     | Description   |
| Message 4(Non-all day meeting for multiple days) | You have been invited to attend a meeting from 9.00AM until 5.00PM from 12/04/2010 to the 13/04/2010 in Meeting Room 1, Block C. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.   |
| Notes  | The location is an optional field when setting up a meeting. Therefore if a meeting location is not specified, the messages above will be displayed without a location. The Meeting organizers contact details are optional. Therefore if no contact details are found, the message above would display without organizers contact details. |

| <i>Table 10: Meeting Cancellation</i>  |   |
|--|---|
| Message Area   | Description   |
| Title  | <Icon> Cancellation - Meeting with case worker  |
| Message 1(Not an all day meeting and the meeting start and end date are on the same day) | The meeting that you were scheduled to attend from 2.00PM until 6.00 PM on 12/04/2010 has been canceled. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information.  |
| Message 2(All day meeting for one day only)  | The all day meeting that you were scheduled to attend on 12/04/2010 has been canceled. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information.                    |
| Message 3(All day meeting for multiple days)   | The all day meeting that you were scheduled to attend from 12/04/2010 until 15/04/2010 has been canceled. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information. |
| Effective Date   | Current Date.   |
| Notes  | The meeting organizer contact details link opens a page showing the organizers contact details.   |

| <i>Table 11: Meeting Update</i> |  |
|---------------------------------|--|
| Message Area                    | Description                                    |
| Title                           | <Icon> Cancellation - Meeting with case worker |

*Table 11: Meeting Update (continued)*

| <b>Message Area</b>   | <b>Description</b>   |
|---|--|
| Message 1(Date and Time change of a non-all-day meeting)                  | The meeting that you were scheduled to attend from 2.00PM until 6.00 PM on 12/04/2010 has been rescheduled to 3.00PM until 7.00 PM on 13/04/2010 in Meeting Room 1, Block C. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.                              |
| Message 2(Location change of a non-all-day meeting)                       | The location of the meeting you are scheduled to attend from 2.00PM until 6.00 PM on 12/04/2010 has changed. This meeting will now take place in Meeting Room 1, Block D. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.                                 |
| Message 3(Date, Time and Location change of non-all-day meeting)          | The meeting that you were scheduled to attend from 2.00PM until 6.00 PM on 12/04/2010 has been rescheduled to 3.00PM until 7.00 PM on 13/04/2010. It will now be in Meeting Room 2, Block C. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.              |
| Message 4(Date change of all day meetings for multiple days)              | The all day meeting that you are scheduled to attend from 12/04/2010 until 15/04/2010 has been rescheduled. This meeting will now take place from 13/04/2010 until 16/04/2010. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.                            |
| Message 5(Location change for all day meeting for multiple days)          | The location of the all day meeting you are scheduled to attend from 12/04/2010 until 15/04/2010 has changed. This meeting will now take place in Meeting Room 1, Block D. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.                                |
| Message 6(Date and location change for all-day meeting for multiple days) | The all day meeting that you are scheduled to attend from 12/04/2010 until 15/04/2010 has been rescheduled. This meeting will now take place from 13/04/2010 until 16/04/2010 in Meeting Room 1, Block D. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend. |
| Message 7(Date change for an all-day meeting)                             | The all day meeting that you are scheduled to attend on 12/04/2010 has been rescheduled. This meeting will now take place on 13/04/2010. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.  |

*Table 11: Meeting Update (continued)*

| <b>Message Area</b>   | <b>Description</b>   |
|---|--|
| Message 8(Location change for an all-day meeting)                                   | The location of the all day meeting you are scheduled to attend on 12/04/2010 has changed. This meeting will now take place in Meeting Room 1, Block D. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.   |
| Message 9(Date and location change for an all-day meeting)                          | The all day meeting that you are scheduled to attend on 12/04/2010 has been rescheduled. This meeting will now take place on 13/04/2010 in Meeting Room 1, Block D. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.   |
| Message 10(Date and Time change of a non-all-day meeting for multiple days)         | The meeting that you are scheduled to attend from 2.00PM until 6.00 PM on 12/04/2010 until 15/04/2010 has been rescheduled. This meeting will now take place at 2.00PM until 6.00 PM on 13/04/2010 until 16/04/2010. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.                              |
| Message 11(Location change of a non-all-day meeting for multiple days)              | The location of the meeting you are scheduled to attend from 2.00PM until 6.00 PM on 12/04/2010 until 15/04/2010 has changed. This meeting will now take place in Meeting Room 1, Block D. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend.  |
| Message 12(Date, Time and Location change of non-all-day meeting for multiple days) | The meeting that you are scheduled to attend from 2.00PM until 6.00 PM on 12/04/2010 until 15/04/2010 has been rescheduled. This meeting will now take place from 2.00PM until 6.00 PM on 13/04/2010 until 16/04/2010 in Meeting Room 1, Block D. Please contact Joe Bloggs at 014567832 or joe@SemAgency.com if you need more information or cannot attend. |
| Notes   | The location is an optional field when setting up a meeting. Therefore if a meeting location is not specified, the messages above will be displayed without a location. Also the Meeting organizers contact details are optional. Therefore if no contact details are found, the message above would display without organizers contact details.             |

### **Payment Messages**

Messages are included for a payment that is issued, a payment that is canceled, a payment due, a payment that is stopped, a payment unsuspended, an over payment that is issued, and an under payment that is issued. A configuration setting is provided which allows an administrator to set the number of days (from the effective date) that payment messages need to be displayed for.

Table 12: Payment Issued

| Message Area                                   | Description  |
|--|--|
| <b>Title</b>                                   | <Icon> Latest Payment  |
| <b>Message 1</b>                               | Your latest payment of \$22.00 was due on 22/07/2009. Click here to view the payment details. Your next payment is due on 29/07/2009. Click My Payments to view your payment history.  |
| <b>Message 2</b> (Payment previously canceled) | Your latest payment of \$22.00 was due on 22/07/2009. Click here to view the payment details. This payment was originally canceled on 23/07/2009. Click here to view details of the canceled payment. Your next payment is due on 29/07/2009. Click My Payments to view your payment history.  |
| <b>Effective Date</b>                          | Current Date   |
| <b>Notes</b>                                   | <p>A payment can be issued, then canceled, and then reissued. The <b>here</b> hyper link opens a page that shows payment details. The <b>My Payments</b> link opens the <b>My Payments</b> page in the Citizen Account.</p> <p><b>Note:</b> If no more payments are due, the Your next payment is due on 29/07/2009 part of the messages is not displayed.</p> |

Table 13: Payment Canceled

| Message Area          | Description   |
|-----------------------|---|
| <b>Title</b>          | <Icon> Payment Canceled   |
| <b>Message</b>        | Your payment of \$22.00, due on 22/07/2009, has been canceled. Click here to view the details. Click Contact Information to contact your caseworker if you need more information. Your next payment is due on 29/07/2009. Click My Payments to view your payment history.                                       |
| <b>Effective Date</b> | Current Date  |
| <b>Notes</b>          | <p>If no more payments are due, the Your next payment is due on 29/07/2009 part of the message is not displayed. The <b>Contact Information</b> link opens the <b>Contact Information</b> tab in the citizen account. The <b>My Payments</b> link opens the <b>My Payments</b> page in the Citizen Account.</p> |

| Table 14: Payment Due |  |
|-----------------------|--|
| Message Area          | Description  |
| <b>Title</b>          | <Icon> Next Payment Due  |
| <b>Message</b>        | Your next Cash Assistance payment is due on 29/07/2011.                          |
| <b>Effective Date</b> | Current Date   |
| <b>Notes</b>          | This message is appropriate when it is the first payment that a client receives. |

| Table 15: Case Suspended |   |
|--------------------------|---|
| Message Area             | Description   |
| <b>Title</b>             | <Icon> Payments Stopped   |
| <b>Message</b>           | Your Cash Assistance payments have been stopped from 29/07/2009. Click Contact Information to contact your caseworker if you need more information. |
| <b>Effective Date</b>    | Current Date  |
| <b>Notes</b>             | The <b>Contact Information</b> link opens the <b>Contact Information</b> tab in the Citizen Account.  |

| Table 16: Case Unsuspended |  |
|----------------------------|--|
| Message Area               | Description  |
| <b>Title</b>               | <Icon> Payments Unsuspended  |
| <b>Message</b>             | Your Cash Assistance payment suspension has been lifted from 29/07/2009. Your next payment is due on 31/07/2009. |
| <b>Effective Date</b>      | Current Date   |
| <b>Notes</b>               | None   |

## Defining Processes in Universal Access

Universal Access offers predefined processes such as applications, screenings, and life events. Customers might want to define their own custom processes to meet the specific needs of the citizen. Motivations infrastructure allows customers to define their own processes, and to allow citizens online access to these processes.

### 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. The script is used to define a set of questions that is displayed to a citizen when a motivation is initiated. A data store schema is used to store the

answers provided by a citizen in the script. The data and display rule set are used to process and display the results. The results of running a motivation are displayed on a configurable results page. Configuration options include how to define how results are categorized, the available actions for particular results and a household member tooltip to represent the status of a person per program.

## Securing Universal Access

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Universal Access (UA) is secured by using the three different types of user accounts, Generic Public Account, System Generated Account, and Citizen Created Account. All information that is captured by UA is secured so that only the client who entered the information has access to it. Each script that runs is linked to a user account. When each page in a script is displayed, a check is completed to ensure that the current user is the user who owns the script information.

### User Accounts

Three separate user accounts are used by IBM Cúram Universal Access (UA); the Generic Public Account, the System Generated Account, and the Citizen Generated Account. Use the following information to understand how to configure these accounts.

#### Generic Public Account

A Generic Public User Account is used when a citizen first accesses the **UA home page**.

#### System Generated Account

After the citizen moves away from the home page, the system generates a temporary user account and automatically logs the user on to the system by using the generated credentials. This System Generated Account is used to secure any data that the citizen enters before they either create their own user account or log in to an existing account. After the citizen logs in, ownership of the data is transferred to the citizen's account.

#### Citizen Created Account

At various stages in UA, the citizen has the option of either creating a user account or logging in to an existing account. After this option is chosen, the citizen's data is secured under this account. This account might be linked to a participant on the system of record that provides the citizen with access to all information accessible from the citizen account. As described in the topic **Creating an Account and Logging In**, multifactor authentication also can be activated to allow for additional authentication when a citizen attempts to log in.

A number of configuration settings exist which apply to user name and password. The following parameters can be defined:

- User name and password length
- The number of special characters that a password must consist of
- The minimum and maximum password length
- The maximum number of login attempts before an account is locked out
- When citizens are required to change their password - this configuration can be specified in days or a date

The terms and conditions URL also can be defined.

#### Related concepts

##### Creating an Account and Logging In

A client can create a Cúram Universal Access (UA) account during the screening and application process. To provide the client with access to all of the information available in the Citizen Account, the client first must be registered as a participant on the system of record for example, Cúram.

### External Security Integration

As an ever greater number of government services move to the Internet, officials drive to ensure that clients can be authenticated for any of these services by using a single set of credentials. This approach



provides benefits for the government in streamlining the authentication process and also for the client because they do not have to remember endless lists of user names and passwords

This process, in turn, increases security by making it less likely that clients write down their user names and passwords and by focusing security efforts on implementing best practice in a single Enterprise Security System. By default, IBM Cúram Universal Access (UA) uses its own authentication system that is backed up by a database of registered users. UA also now can be configured to integrate with External Security Systems.

UA can be deployed in **Identity Only** mode for registered users so that account creation happens externally and user accounts defer externally for authentication.

While clients can access the government services through the Internet, downloading sensitive personal information on a public computer is a security risk as the downloaded files are cached by the browser. To help clients deal with this issue, the system notifies the client regarding the risk in the form of a warning message before the client downloads the PDF. The warning message is configurable in system administration.

The system also displays a timeout message to the user when the application is left idle for a certain period. The time after which the timeout message is displayed is configurable. The client either can continue to use the application or quit by responding to the timeout message. The system automatically will log the client out from the session if no response is received from the user.

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