IBM Cúram Social Program Management 8.0.2

Cúram Social Enterprise Collaboration Guide

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Note

Before using this information and the product it supports, read the information in "Notices" on page 20

Contents

Tables

Chapter 1. Cúram Social Enterprise Collaboration Guide

Cúram Social Enterprise Collaboration is a common platform and set of tools for multi-disciplinary collaboration in social program organizations. Multi-disciplinary teams are involved in supporting the needs of clients and families, including other agencies, local providers, and interested community partners. Cúram Social Enterprise Collaboration enables these stakeholders to reach beyond their organizational boundaries to collaborate in support of their clients' needs.

Key features

The key features of the Social Enterprise Collaboration include the following five points:

- The goal of social enterprise collaboration is to help clients and families in need. This goal is based on the premise that real solutions for families are more likely to be achieved through the collaborative efforts of agencies, skills professionals, and the clients themselves.
- Multidisciplinary teams are made up of skilled and concerned individuals who are prepared to work together to help clients and families. These teams can be predefined, where the same team members can work with multiple families, or they can be defined for a specific family, including teachers and members of the family community.
- Social enterprise folders and the citizen context viewer provide central hubs for helping clients and families in a collaborative way. The social enterprise folder brings cases and clients together, and provides multidisciplinary teams with a forum to work together. The citizen context viewer provides a summary of important client information.
- Collaborative outcome plans and investigations allow multidisciplinary teams to provide input on outcome plans and investigations for which they are assigned. Configured sharing options allow relevant information to be displayed to multidisciplinary team members in the MDT Portal.
- Key to social enterprise collaboration is the ability for agencies and multidisciplinary teams to share information. The Cúram Case and Participant Index makes available client and case information across systems, thus opening up communication channels.

What Is Social Enterprise Collaboration?

Social enterprise collaboration is a new approach to helping clients and their families. Its main premise is to encourage agencies and other interested parties to collaboratively work together to identify the root cause of family problems and to help the family achieve positive outcomes. In order to do this, agencies and other interested parties should have a holistic view of clients and their families across agencies and programs.

By providing a mechanism to open up communications between clients, family members, agencies, and service providers, this holistic view can be achieved. Open communication channels will remove duplication of efforts, protect against fraud, and match the skills of agency workers and providers to the needs of clients. Successful social enterprise collaboration depends on holistic solutions for families. Social service agencies must have the ability to choose from a wide range of available benefits and services in order to achieve lasting change.

The traditional approach of social enterprise agencies is to deliver benefits and services on a per client per program basis. While these programs ensure a client's basic needs are met, it is difficult to address the root cause of problems. Without visibility between agencies and programs, it can be very difficult for agencies to track overall client progress. As a result clients can often develop long-term dependency on government assistance.

Who Are the People Involved?

A very important aspect of social enterprise collaboration is to widen the scope of persons who can work together to help clients and their families. The groups responsible for delivering benefits and services include social enterprise agencies, governments who fund the agencies, and service providers who offer their services through the agencies. These are all skilled professionals who work with families helping them to acquire their own skills to achieve positive outcomes. Examples include employment agencies, training centers, doctors, foster care facilities, and addiction clinics.

Social enterprise collaboration also considers the members of client communities who have relationships with clients and their families. Community advocates are likely to have a better understanding of the underlying causes which has led families to need assistance and are thus better prepared to assist clients in achieving sustainable, positive outcomes. Examples of community advocates include teachers, coaches, school psychologists, employers, god-parents, and friends of the family. An ever increasing trend is to rely on the skills and resources of people who want to help in addition to relying on just those who are employed to help. Non-governmental organizations (NGOs) can also participate in assisting clients and their families.

How Does Cúram Fit this Model?

The Cúram Social Enterprise Collaboration Suite is a set of commercial-off-the-shelf (COTS) tools designed with the specific goal of enabling the persons involved in a social enterprise collaboration to collaborate on delivering positive outcomes for clients and families.

The tools currently supported are the Multidisciplinary Team Portal (MDT Portal), the Social Enterprise Folder (SEF), and the Citizen Context Viewer (CCV). The purpose of each tool is as follows:

- The MDT portal provides teams of skilled individuals and community members a forum where they can share information and communicate effectively with each other. It provides communication tools such as discussion boards and support for scheduling meetings and recording meeting minutes which enable persons to work collectively to help families.
- The SEF and CCV provide access to family information in an organized fashion. The SEF is a central hub for managing clients and cases and collaborating on outcome plans or investigations. The CCV can be used with the SEF; it provides a summary of client information in a tree-structure.

Multidisciplinary teams

Use this information to understand the support that is provided for multidisciplinary care teams.

Benefits of Working in Teams

The concept of social enterprise collaboration is based on the premise that families have complex needs requiring complex and innovative solutions. The role of the multidisciplinary team is to enable skilled and concerned individuals to collaborate together. By working together, multidisciplinary teams can:

- Help to resolve difficult cases
- Promote coordination between agencies
- Identify service gaps and breakdowns in coordination and communication between agencies and individuals
- Provide a forum for learning more about the strategies, resources, and approaches used by various disciplines

Professional disciplines that are typically represented include child and adult protective services, the civil and criminal justice systems, health and social services, and mental health. Some teams include domestic violence advocates, substance abuse specialists, clergy, and policy-makers. Financial abuse specialist teams focus on cases involving exploitation and include representatives from financial institutions, including banks or credit unions, stock brokerage firms, mortgage lenders, private trustees or guardians, and others.

Types of MDTs And Their Uses

Fundamental to the success of social enterprise collaboration is the ability of multidisciplinary teams to work together to effectively manage the needs of clients and their families.

There are two types of multidisciplinary teams in Cúram: predefined multidisciplinary teams consisting of persons who continue to work together to help multiple families and individual multidisciplinary teams whose goal is to assist one family in particular. The type of multidisciplinary team that is required for a social enterprise folder is configured as part of social enterprise collaboration administration.

Predefined multidisciplinary teams are typically matched to case types with predefined goals. For example, the predefined goals of high risk cases such as domestic abuse investigation are to assess the risk of re-assault or violence and take the necessary steps to protect any persons in harms way. Domestic abuse investigations would require members of law enforcement who can intervene in the home, prosecutors who can protect the legal rights of family members, child protection or family services workers familiar with trends in domestic violence, and psychologists for the purpose of assessment family dynamics. An important attribute of predefined teams is the experience these teams have in working with each other. Investigation cases, in particular, can benefit from predefined teams who are familiar with each other, know how best to communicate with the team, and understand the strengths of each member.

Predefined teams and their team members are configured as part of social enterprise collaboration administration. All social enterprise folders using a predefined team will have the same team members. Predefined teams can be updated at the administration level so that all social enterprise folders relying on this team can automatically avail of these changes. For example, if a member of a predefined team is on holidays, a person can be assigned to fill their role. It is crucial that social enterprise folders dependent on predefined teams continue to be supported when teams go through changes.

Families with complex and ongoing needs require a multidisciplinary team who understands their personal circumstances. For example, an ongoing case aimed at assisting a child who was in a abusive situation requires team members who have established relationships with the child. Where predefined teams are designed to include team members filling specific roles, individual multidisciplinary teams are set up within a social enterprise folder and can be dynamically changed over time. For example, the teachers of children in a family can be updated each school year. To support the creation and maintenance of individual multidisciplinary teams, functionality is provided to add MDT members who are in existing teams, add completely new members, and add existing users.

How MDTs Collaborate Together

The ultimate goal of multidisciplinary teams is to use their range of skills and to share information in order to help clients and their families.

Cúram provides multidisciplinary team members with tools to help them achieve this goal. Social enterprise folders are the central hub for sharing information and exchanging ideas. Business tools are available to help multidisciplinary teams communicate effectively with each other and collaborate their efforts to help families. The following table provides a summary of the business functionality that multidisciplinary teams can use in their collaboration efforts:

Table 1. Business Functionality to Help MDTs Collaborate	
Business Functionality	**Summary**
Discussion boards	Multidisciplinary team members can use discussion boards to share advice and important information. These discussion boards can be configured to email multidisciplinary team members when discussions are posted and comments added making it as easy as possible for team members to be informed and have the opportunity to participate in a discussion.

Table 1. Business Functionality to Help MDTs Collaborate (continued)	
Business Functionality	**Summary**
Scheduling meetings	To address the needs of children and their families, meetings can be scheduled by any multidisciplinary team member or agency worker. PIM integration allows meeting invites to be accepted in their personal calendars, for example in Microsoft Outlook, making it easier to coordinate meetings.
Recording meeting minutes	The record meeting minutes wizard provides functionality for recording general meeting details, adding meeting notes, listing meeting decisions, marking attendees, outlining actions, attaching files, and associating the minutes with a related case. These meeting minutes can be automatically issued to meeting attendees, declining invitees, and other interested persons via email.
Reporting incidents	Incident reporting is necessary to facilitate prevention, ensuring that potential indicators concerning a family's history are tracked in order to avoid more serious situations. Failure to report an incident, for example of child abuse, could result in a second incident of child abuse and delay the family intervention and referral of the child to child services.

Posting Discussions

Discussion boards are communication tools that allow comments and questions relating to a particular subject be posted online. Members of the discussion board can actively engage in discussions by responding with their own remarks over time. The purpose of these discussions is to promote coordination and teamwork between multidisciplinary team members and agency workers enabling them to share advice and important information that may impact the resolution of the case.

The main players of a discussion board are the discussion moderator and the discussion watchers. The role of the discussion moderator is to ensure that all discussions are handled appropriately and thus has the ability to manage all aspects of a discussion. The default configuration is to set the discussion moderator to the social enterprise folder owner. (For information on changing this default, see the `Cúram Social Enterprise Folder Configuration Guide`). Since discussions can contain highly sensitive and important information, the discussion moderator has the sole responsibility of closing a discussion.

The role of discussion watchers is to actively engage in the discussion by viewing and contributing discussion comments. Discussion watchers can view the discussion and are automatically notified via email when comments are added. By default, all multidisciplinary team members, the social enterprise folder owner, the discussion moderator, and any persons creating the discussion are added as discussion watchers. Internal Cúram users can add themselves to the list of watchers so that they receive notifications. Alternatively, any existing watcher (including external users who are part of the multidisciplinary team) can choose to stop watching the discussion.

Note: Functionality is enabled and disabled on a discussion board according to a user's access rights. For example, the link to close a discussion is only accessible to the discussion moderator. The link to edit discussion comments is only available to users with the rights to update the comments.

Scheduling Meetings

Meetings can be scheduled by any non-agency multidisciplinary team member or agency worker. Various people can be invited to meetings including clients, multidisciplinary team members, agency workers, and other persons who play a role. The purpose of these meetings can span a range of goals including:

- Sharing case information with involved professionals and determining an appropriate course of action.
- Allowing team members to thoroughly review all aspects of a case gaining an understanding of the case complexity.
- Providing team members with an opportunity to discuss general issues, problems, and concerns.

Meetings can be rescheduled by editing the existing date and time. Emails are sent to all persons invited to the meeting, even persons who have declined the original invite, allowing them to accept, reject, or mark as tentative the newly scheduled meeting. Meetings can also be canceled. An email is sent to all persons invited with a link to remove the meeting from their calendars.

Recording Meeting Minutes

The record meeting minutes wizard assists users in capturing the details of a meeting and issuing meeting minutes to attendees and other interested parties. Each step in the wizard is optional, providing a flexible approach to capturing key information. The record meeting minutes wizard also supports work-in-progress minutes, allowing pieces of information to be recorded all at once or over a period of time. The following meeting information can be captured:

Meeting Details
This includes the meeting subject, location, start and end date/time, as well as the name of the person who organized the meeting and the meeting agenda. Any information entered as part of scheduling the meeting will pre-populate the meeting details.

Meeting Notes and Decisions
Meeting notes and decisions can be recorded in rich text format. These are separate steps in the meeting wizard.

Meeting Attendance
Meeting invitees can be added to the meeting attendees list. Additional invitees can be added, along with their email addresses, to allow for the minutes to be issued to them.

Meeting Actions
Any meeting actions decided upon can be added to the meeting minutes along with the person responsible for the action and the due date by which it is to be complete. A task is created in the background to track progress and is viewable from an internal user inbox and an external user actions list.

Meeting Files
Files can be attached to meeting minutes. File attachments are accessible by viewing meeting minutes.

Meeting Cases
One or more cases can be associated with the meeting, if relevant.

Meeting Summary
This is a summary of the meeting minutes information recorded thus far.

Once the meeting minutes are recorded, the meeting organizer or the user who has recorded the meeting minutes can issue them to any person invited to the meeting. By default, meeting minutes are issued via email with the minutes in an attached PDF document, thus email addresses are required. An informational is displayed when minutes are issued and one or more email addresses are missing or invalid.

Meetings can be issued multiple times and a record is maintained of the history of minutes issued. Each time a version of meeting minutes are issued, the meeting minutes are baselined. This allows users to view the actual minutes as they were at the time of issue.

Reporting Incidents

Incidents are events that have, or could have, a direct negative effect on the health and safety of a client. When reporting an incident, you must provide the following information:

- A detailed description of the incident and the date and time the incident occurred.
- Names of affected clients.
- Name and contact details of participants, for example, witnesses, affected clients.
- Any supporting documentation, for example, evidence verifying the circumstances of the incident; files can be attached to an incident thus providing evidence and supporting documentation for the incident.

Process-driven MDT Portals

MDT portals provide multidisciplinary team members with the tools they need to collaborate with each other, with agency workers, and with families. These portals are process-driven making it as easy as possible for MDT members to coordinate with team members.

From MDT portals, an MDT member can do the following:

- Report incidents effecting clients.
- Post and watch discussions.
- Schedule meetings and manage meeting actions.
- Email team members.
- Add notes.
- Add attachments.
- Add a note for a service or action delivered by an outcome plan.

From MDT portals, an MDT member can see the following:

- Clients and cases.
- Scheduled meetings and recently posted meeting minutes.
- Recently reported incidents.
- Multidisciplinary team members that they can work with.
- Actions assigned to the MDT member.
- Activities (services, actions, referrals) delivered by an outcome plan.

Redefining Multidisciplinary Teams

The process of redefining multidisciplinary teams differs between predefined teams and individual teams.

The team members of a predefined team are meant to be consistent across all social enterprise folders relying on that team. In effect, these predefined teams are not meant to be redefined, since their purpose is to offer consistent representation for clients in similar circumstances. For example, the multidisciplinary team working on child welfare cases should treat each family in the same fashion in order to ensure the protection of all children. Having a team familiar with each other and the work is beneficial to addressing the needs of children and their families. Predefined teams are designed so that only an administrator can add or remove team members, thus updating all social enterprise folders which rely on that team. It is, however, possible to replace one predefined team for another within a social enterprise folders. All predefined teams assigned to a social enterprise folder over time can be viewed in a history.

The main benefit to defining an individual multidisciplinary team is the flexibility in redefining the team. New members can be added by selecting them from existing multidisciplinary team members already recorded in the system. New members can also be added who have never been part of a multidisciplinary team. The system will automatically update the team members listed in the administration component so that other multidisciplinary teams can contain the same member. New members can also be added by selecting them from users within the agency. Any member added to a multidisciplinary team can

be removed. The only exception is that a lead member must be changed before that member can be removed.

A record of previous members is maintained for both predefined and individually defined multidisciplinary teams. This allows agency workers to see who has worked on the social enterprise folder over time and to contact previous team members when necessary. For example, an agency worker might wish to find out more about a previous discussion or may require advice on how to work with a client.

Sharing Outcome Plan Activities, Notes & Attachments

Outcome plan activities (services, actions, referrals) may be shared with non-agency multidisciplinary team members via the collaborative outcome plan. Notes and attachments may be shared with non-agency multidisciplinary team members via the collaborative outcome plan and collaborative investigation. An agency worker must specifically indicate that the item is to be shared with a particular non-agency team member. This item is then available to be viewed by the non-agency team member in a collaborative outcome plan via the MDT Portal. A multidisciplinary team sharing governance model has been put in place to provide control regarding what can be shared and with whom it may be shared. The model defines whether activities, notes or attachments are sharable with a particular role of multidisciplinary team member (e.g. teacher, doctor etc.) or with an individual multidisciplinary team member. The sharing defined for a specific individual takes precedence over that defined for the individual's role. In this manner, specific team members can be assigned either greater or more restricted access than that defined for their role. There are three settings for each type of item that can be shared:

- Not Shared

  This means that the item cannot be shared with either the team member or the role. If defined for a role, team members with this role will not appear in the lists of team members with whom the item can be shared. If defined for an individual team member, this individual will be excluded from the list of team members with whom the item can be shared.

- Shared (Preselected)

  If defined at the role level, any team member who fills that role will be included in the list of members with whom the item can be shared. If specified for a team member, that team member will be included in the list regardless of the sharing defined for their role. The checkbox displayed in the list to indicate whether the item is to be shared with the team member will be automatically selected.

- Shared (Not Preselected)

  If defined at the role level, any team member who fills that role will be included in the list of members with whom the item can be shared. If specified for a team member, that team member will be included in the list regardless of the sharing defined for their role. The checkbox displayed in the list to indicate whether the item is to be shared with the team member will not be selected. The user must click on the checkbox to share the item with the team member.

Social Enterprise Folder

Introduction

The Social Enterprise Folder (SEF) is a type of case used to present a view of client and case information from multiple agencies and systems. The SEF is a central hub for accessing information about multiple clients (such as family members) and their cases. It is integrated with the Cúram Case and Participant Index (CPI) to facilitate display of information from multiple disparate systems and agencies. Agency workers and multidisciplinary team members can use a SEF to securely share information and work together in order to achieve positive outcomes for clients and their families. Rather than having to access many systems across various agencies to gain a complete understanding of a family's case history, the SEF displays this information in one central location. For more information, see "(deprecated) Cúram Case and Participant Index (CPI)" on page 17.

There are two views onto a SEF; the agency worker view and the non-agency multidisciplinary team member view. The agency worker view presents a rich suite of functionality to enable internal agency

employees (possibly from multiple agencies) to collaborate on the delivery of programs to one or more common clients. The non-agency multidisciplinary team member view, whilst providing only the functionality appropriate to a user who is not an agency employee, enables a member of a multidisciplinary team to participate collaboratively with agency workers to ensure that the most effective programs are delivered to clients. The non-agency multidisciplinary team members access the SEF via the MDT Portal.

SEFs have a very straightforward lifecycle. They have a status of *Open* from their creation date until the date on which they are closed. A *Closed* SEF can be reopened, changing the status from *Closed* back to *Open*. A status history is maintained displaying the start and end date of the changing statuses.

SEF For Agency Workers

Agency workers have access to SEFs via standard Cúram caseworker facing applications. A SEF may be created by an agency worker with the appropriate security privileges. It may not be created by an MDT member. The Cúram Citizen Context Viewer (CCV) is used to aid in the creation of a SEF. The CCV, also integrated with the CPI, is used to identify the clients and cases to be added to the SEF. This provides the user with a quick and easy method to add all of the appropriate clients and cases to the SEF. As mentioned earlier, use of the CPI means that these cases and clients may be sourced from multiple disparate systems. For more information, see "(deprecated) Cúram Case and Participant Index (CPI)" on page 17.

The remainder of this section outlines the SEF functionality available to an agency worker.

Clients

Clients added to a SEF may be either fully registered Cúram clients or CPI based clients whose information has been retrieved from a non-Cúram system. The information available for the client depends upon whether the client is Cúram registered or CPI based. If Cúram registered, the Cúram participant manager may be accessed from the SEF to record and view an extensive set of information with regard to the client. If CPI based, the client information available depends upon the data stored for each client in the CPI. The customer may extend the CPI to include information specific to their particular needs. For more information, see "(deprecated) Cúram Case and Participant Index (CPI)" on page 17.

Clients may be added to a SEF as part of the initial creation of the case. Additional clients may be added to the SEF at later dates. Clients may also be removed from the SEF. The SEF retains a history of the addition and removal of clients.

Cases

Cases added to a SEF may be fully Cúram based, i.e. case management is undertaken by the Cúram application, or they may be based in non-Cúram systems and available to the SEF via the CPI. If the case is a Cúram managed case, the agency worker (assuming the worker has the appropriate security privileges) may access the case from the SEF. If the case is managed by a non-Cúram system, the user will have access only to the information stored in the CPI for that case. The customer may extend the CPI to include case information specific to their particular needs (please refer to the CPI chapter of this document for more information). For more information, see "(deprecated) Cúram Case and Participant Index (CPI)" on page 17.

Cases may be added to a SEF as part of the initial creation of the SEF. Additional cases may be added to the SEF at later times. Cases may only be added that involve clients already added to the SEF. Cases may also be removed from the SEF. The SEF retains a history of the addition and removal of cases.

Multidisciplinary Team

SEFs may be configured using the Cúram Administration Application to utilize one of two types of multidisciplinary teams.

• Predefined

The multidisciplinary team may be a predefined in the Cúram Administration Application. The SEF user can add a team to the case, however the user is unable to make any modifications to the make up of the team, i.e. new members cannot be added to the team or existing members may not be removed from the team by the user of the SEF. The team make up may be changed by an administrator and any updates to the team will automatically be available to any SEF to which the team has been assigned. A history of the changes made to the team is available within the SEF. In addition, a history of the teams assigned to the SEF is also available if more than one team has been used to deal with the SEF.

- Ad Hoc

A multidisciplinary team may be created by the user of the SEF specifically to meet the needs of the SEF. The user can add both agency workers and non-agency workers to the multidisciplinary team and can select the team member to fulfill the lead role. A history of the make up of the team is retained, i.e. when members have been added and removed from the team.

The agency worker can view the contact details for each member of the multidisciplinary team. In addition, they can also view a list of other teams the team member is assigned to, and a list of the particular skills that the team member possesses.

Once assigned to a SEF, non-agency multidisciplinary team members can access information relating to the SEF via the MDT Portal.

Incidents

The SEF contains a list of incidents for which any client of the SEF has played some sort of role, e.g. affected client, reporter, witness etc. The user has access to all of the information regarding the incident from the SEF. For more information on Incidents please refer to the Cúram Participant Guide.

Calendars, Meetings & Meeting Minutes

The SEF includes a calendar that displays all of the meetings that have been scheduled in respect of the SEF. The meetings may be viewed in a calendar or a list view. In addition to the standard calendar and meeting functionality (for more information, please refer to the Cúram Integrated Case Management Guide and the Cúram Calendaring Guide), non-agency multidisciplinary team members may also be invited to attend meetings. Meeting minutes may be recorded for any meeting scheduled for the SEF. In addition to the standard meeting minutes functionality (please refer to Cúram Integrated Case Management Guide), attendance may be recorded and actions may be assigned to non-agency multidisciplinary team members. Actions assigned to a non-agency multidisciplinary team member will be displayed in the MDT Portal. Meeting minutes can also be issued to non-agency multidisciplinary team members. These too will be available in the MDT Portal as a PDF document that the non-agency multidisciplinary team member can open, read and print.

Discussions

As mentioned in "Posting Discussions" on page 4 a discussion board is provided in the SEF where members of the multidisciplinary team can discuss issues relating to the outcome plan.

Related SEFs

SEFs can be related to each other if they share a common client or perhaps are dealing with similar issues. As with standard case relationships, SEF relationships can be manually recorded by a user. Additionally, upon creation of a new SEF, relationships are automatically created between the new SEF and any existing SEF involving the new SEF's clients.

Standard Case Management Functions

The following standard case management functionality is also available for use within a SEF. Please consult the Cúram Integrated Case Management Guide for more information.

- Notes
- Attachments

- Communications
- Status History
- Transaction History
- User Roles
- Interactions

SEF for Non-Agency Workers

As discussed earlier, both agency and non-agency workers may be members of the multidisciplinary team assigned to a SEF. The previous section presented the SEF information and functionality available to an agency worker. This section outlines the SEF information and functionality available to a non-agency multidisciplinary team member. These multidisciplinary team members access the SEFs to which they have been assigned via the MDT Portal. The MDT Portal is a secure environment where non-agency multidisciplinary team members are able to collaborate with other team members (both agency and non-agency).

The remainder of this section outlines the SEF functionality available to a non-agency multidisciplinary team member via the MDT Portal

Clients

Lists of the clients currently and previously involved in the SEF are displayed. The non-agency multidisciplinary team member can view the dates when clients where added or removed from the SEF by agency workers. However, the non-agency multidisciplinary team member cannot add or remove clients from the SEF. A limited amount of client demographic information (address, phone number, date of birth) is available to the non-agency multidisciplinary team member.

Cases

The non-agency multidisciplinary team member can view a list of the cases currently associated with the SEF and also a list of the cases previously associated with the SEF. The non-agency multidisciplinary team member cannot add or remove cases from the SEF, only agency workers can carry out these functions. The non-agency multidisciplinary team member can view the case reference number, type, clients and status. No other case information is provided to the non-agency multidisciplinary team member.

Notes

Standard case notes are available to the non-agency multidisciplinary team member in a SEF. The non-agency multidisciplinary team member can add notes that may be viewed and updated by other non-agency multidisciplinary team members and agency workers that possess the appropriate sensitivity level (for more information on case notes, please refer to the Cúram Integrated Case Management Guide).

Calendars, Meetings & Meeting Minutes

The SEF includes a calendar that displays all of the meetings that have been scheduled in respect of the SEF. The meetings may be viewed in a calendar or a list view. Non-agency multidisciplinary team members can set up meetings with agency workers and other non-agency multidisciplinary team members to discuss aspects of the SEF (for more information on meeting and calendar functionality, please refer to the Cúram Integrated Case Management Guide and the Cúram Calendaring Guide). The non-agency multidisciplinary team member can also record meeting minutes for any meeting they organized.

Attachments

Standard case attachments are available to the non-agency multidisciplinary team member. The non-agency multidisciplinary team member can add attachments that may be viewed and updated by other non-agency multidisciplinary team members and agency workers that possess the appropriate

sensitivity level. For more information on case attachments, please refer to the `Cúram Integrated Case Management Guide`.

Discussions

The non-agency multidisciplinary team member can post and participate in discussions with other team members pertaining to the issues addressed by the SEF. By default, all members of the multidisciplinary team are added as watchers to any discussion posted on the SEF. A non-agency multidisciplinary team member is sent a notification, via email, when a new discussion is posted or an update is made to an existing discussion for which the non-agency multidisciplinary team member is a watcher. The non-agency multidisciplinary team member can opt to stop watching a particular discussion if they are no longer interested in the topic being discussed. Notifications will no longer be sent to the non-agency multidisciplinary team member is response to updates on the discussion.

Incidents

The non-agency multidisciplinary team member can view a list of incidents for which any client of the SEF has played some sort of role, e.g. affected client, reporter, witness etc. The non-agency multidisciplinary team member may only view information on the incident for clients with whom they are involved. They may not view information pertaining to other clients. If the incident was created by a non-agency multidisciplinary team member, that user has access to functions to update information regarding the incident. Otherwise the non-agency multidisciplinary team member may view the information only. For more information on Incidents please refer to the `Cúram Participant Guide`.

Multidisciplinary Team

A list of the members of the multidisciplinary team assigned to the SEF is displayed. This list contains the role, telephone number and email address of each member of the team. If the non-agency multidisciplinary team member plays the lead role in the team, they have access to functions to add additional members to the team and to also assign a new lead member.

Securing Information in a SEF

Information in social enterprise folders can be secured using sensitivity. All users (both agency and non-agency) are assigned a sensitivity level. By assigning a sensitivity level to information in a social enterprise folder, only those users whose sensitivity level is equal to or greater than the assigned sensitivity level can access the information. Sensitive information within social enterprise folders is asterisked out. For example, an attachment within the social enterprise folder can be assigned a sensitivity level of three; only users with a sensitivity level of three or higher can view the attachment otherwise all references to the attachment are asterisked out.

Configuration options are available to determine whether or not sensitive information is viewable when there are components which pertain to multiple clients. For example, incident sensitivity can be set to a level equal to or lower than user sensitivity or equal to or higher than the social enterprise folder client with the highest sensitivity. The following social enterprise folder components can be secured using sensitivity:

Table 2. Description of Sensitivity Security for SEF Components	
SEF Function	**Sensitivity Description**
Attachments	When creating an attachment, a user can only set the sensitivity to equal or lower than their own sensitivity level. Only users with the a sensitivity level greater than or equal to the assigned sensitivity level may view the attachment.

SEF Function	Sensitivity Description
	Table 2. Description of Sensitivity Security for SEF Components (continued)
SEF Function	**Sensitivity Description**
Meetings	When creating meetings, a user cannot invite clients or case participants to the meeting unless the user sensitivity is equal to or higher than the client or case participant sensitivity.
Case	Case sensitivity is set prior to when the case is added to the social enterprise folder and is derived from the sensitivity of the primary client. This also applies to external cases retrieved using the CPI. Only users with the a sensitivity level greater than or equal to that of the case will be able to view the case information.
Clients	Client sensitivity is set prior to when the client is added to the social enterprise folder and is based on the person's participant sensitivity level. This also applies to external persons retrieved using the CPI. Only users with the a sensitivity level greater than or equal to that of the client will be able to view information regarding the client.
Communications	When creating a communication, a user can only set the sensitivity to equal or lower than the user's sensitivity and equal or higher than the sensitivity of the communication correspondent.
Discussions	Users creating a discussion, a user cannot set the discussion sensitivity to be higher than their own. When discussions are posted, the system compares the discussion sensitivity to the sensitivity of multidisciplinary team members. Only those members whose sensitivity is equal to or higher than the discussion sensitivity will be added as watchers.
Incidents	When creating an incident, a user can only set the sensitivity to equal or lower than the user's sensitivity and equal or higher than the sensitivity of the affected client with the highest sensitivity. Users can view incidents only if they pass the sensitivity check for all of the affected clients.
Meeting Minutes	Users can access meeting minutes as long as they pass the sensitivity check for at least one case participant on the meeting minutes. When recording meeting minutes, users cannot set the recorded meeting minutes sensitivity to be higher than their own or lower than the client (invited to the meeting) with the lowest sensitivity.
Notes	When creating a note, a user can only set the sensitivity to equal or lower than their own sensitivity level. Only users with the a sensitivity level greater than or equal to the assigned sensitivity level may view the note.

Table 2. Description of Sensitivity Security for SEF Components (continued)	
SEF Function	**Sensitivity Description**
Related Social Enterprise Folders	To create relationships between social enterprise folders, a user must have a sensitivity of the client or case with the lowest sensitivity on either related social enterprise folder.
Transaction History	Transactions created as a result of sensitivity processing will not be viewable to users who do not have the necessary sensitivity level.

Collaborative Outcome Plan

The Collaborative Outcome Plan is a type of SEF used to allow non-agency multidisciplinary team members collaborate with agency workers in the delivery of services to the clients of an outcome plan. A collaborative outcome plan is automatically created by the system in response to the creation of a new outcome plan where sharing has been enabled for that particular type of outcome plan.

A collaborative outcome plan may not be created manually and may be accessed solely by non-agency multidisciplinary team members via the MDT Portal. It represents the non-agency multidisciplinary team members view of an outcome plan. Agency workers use the actual outcome plan and do not use the collaborative outcome plan. Only a subset of the information available in the outcome plan is available in the collaborative outcome plan. The information available in the collaborative outcome plan depends upon several factors, however most important among these factors is sharing. Sharing can be configured for outcome plan notes, attachments and activities (the services, actions and referrals delivered by the outcome plan). A non-agency multidisciplinary team member can only view these items if an agency worker has specifically indicated that the item can be shared with the non-agency multidisciplinary team member.

Configuring an Outcome Plan for Sharing

Each type of outcome plan can be configured using the Cúram Administration Application to have sharing either enabled or disabled. If sharing is enabled, a multidisciplinary team can be assigned to the outcome plan and upon creation of an outcome plan a collaborative outcome plan is also created to allow the non-agency members of the team to collaborate in the delivery of services to the outcome plan clients. Two types of multidisciplinary team may be associated with a particular type of outcome plan:

- Predefined

  The multidisciplinary team may be a predefined in the Cúram Administration Application. The outcome plan user can add a team to the case, however the user is unable to make any modifications to the make up of the team, i.e. new members cannot be added to the team or existing members may not be removed from the team by the user of the outcome plan. The team make up may be changed by an administrator and any updates to the team will automatically be available to any outcome plan to which the team has been assigned. A history of the changes made to the team is available within the outcome plan. In addition, a history of the teams assigned to the outcome plan is also available if more than one team has been used to deal with the outcome plan.

- Ad Hoc

  A multidisciplinary team may be created by the user of the outcome plan specifically to meet the needs of the particular plan. The user can add both agency workers and non-agency workers to the multidisciplinary team and can select the team member to fulfill the lead role. A history of the make up of the team is retained, i.e. when members have been added and removed from the team.

Once assigned to a multidisciplinary team, a non-agency team member can access any collaborative outcome plans to which the team have been assigned via the MDT Portal. However, there are several factors that determine the actual information within the collaborative outcome plan that the non-agency team member can view. Principle among these factors is *sharing*. Sharing may be applied to outcome

plan notes, attachments and activities and is based on the governance model configured using the Cúram Administration Application (for more information see Multidisciplinary Teams section).

If sharing has been enabled, in addition to the creation of a collaborative outcome plan, a *Collaboration* navigation tab is added to the outcome plan navigation bar. The Collaboration tab contains the following two pages;

- Multidisciplinary Team

  The content and functionality of this page depends upon the type of team that can be added to the outcome plan, i.e. predefined or ad hoc.

- Discussions

  A list of discussions that have been raised concerning the outcome plan.

The Collaboration tab, and thus the pages contained within, are not displayed in the outcome plan if sharing is not enabled.

Sharing Notes & Attachments

Notes and attachments are shared in a similar manner. If sharing is enabled for an outcome plan, when a new note or attachment is created, the agency worker is given the option of selecting the non-agency members of the multidisciplinary team with whom the note or attachment can be shared. This list of non-agency members is only displayed on outcome plans where sharing has been enabled. The list will contain only those members of the team with whom the item can be shared. For example, an agency may not want to share outcome plan notes with non-agency multidisciplinary team members of a particular role. Therefore, any team member who fills this type of role will be excluded from the list. The note or attachment will be shared with each team member from the list selected by the agency worker. An email will be sent to the non-agency multidisciplinary team member informing them of the addition of the new item to the outcome plan. The team member can click on a link in the email to open the MDT Portal, where after supplying the correct authentication information, they can view the details of the new item added to the outcome plan.

Non-agency members of a multidisciplinary team can also add notes and attachments to a collaborative outcome plan. They cannot choose the other non-agency members of the multidisciplinary team with whom the item will be shared. This is the role of the outcome plan owner. When a note or attachment is added to a collaborative outcome plan, it is in effect added to the outcome plan. The plan owner is notified by the system of the addition of the new item. The plan owner can review the item and determine the other non-agency members of the multidisciplinary team with whom the new item should be shared. The selected non-agency members are informed of the addition of the new item and can view the item via a collaborative outcome plan in the MDT Portal.

Sharing Activities

Information pertaining to the activities (services, actions and referrals) delivered to the clients of an outcome plan may be shared with non-agency members of the multidisciplinary team. An additional *sharing* step is included in the wizards used to add activities to an outcome plan if sharing has been enabled for the plan. The sharing step is not present in the wizards if sharing has not been enabled. This step allows the user to select the non-agency members of the team with whom the activity should be shared. The non-agency members displayed in the list depends upon whether activity sharing has been enabled for the member or the role that the member fulfills. If activities are not sharable with a particular member, that member will not appear in the list of selectable team members. In addition, there may be certain types of actions or services that are of a particularly sensitive nature where sharing is not appropriate with particular team members or roles. Restrictions can be defined. These allow the administrator to restrict the team members or roles with which a particular service or action can be shared. For example, in general activities may be shared with school teachers who are members of a multidisciplinary team. However, there may be certain activities of a sensitive nature that the agency does not want the teachers to be informed of. A restriction can be defined that prevents teachers from appearing in the list of non-agency team members with whom these types of activity can be shared with. Therefore these types of activity cannot be shared with a teacher even though other types of activity may be shared with teachers.

An email will be sent to the non-agency multidisciplinary team member informing them of the addition of the new activity to the outcome plan. The team member can click on a link in the email to open the MDT Portal, where after supplying the correct authentication information, they can view the details of the new activity. The information shared varies depending upon the type of activity. For each activity type, the activity name, clients in receipt of the activity, start and end dates, and the current status are displayed. In addition, for a referral, the provider name, referral date and whether the client contacted the provider is also displayed. Services display the provider name and number of units delivered, as well as any notes or progress information recorded. Actions display the notes and progress information recorded for the action. In addition to viewing notes, the non-agency team member can use the MDT Portal to record their own notes with regard to an action or a service. These notes are viewable by any other team member who has access to the action or service via the collaborative outcome plan or outcome plan.

Collaborative Outcome Plan Features

- Activities

  A list of the services, actions and referrals delivered to the clients of the outcome plan that have been shared with the non-agency team member viewing the collaborative outcome plan. The non-agency team member can record notes for services and actions thus providing feedback and opinion to agency workers.

- Notes

  A list of the notes recorded by agency and non-agency team members that have been shared with the non-agency team member viewing the collaborative outcome plan.

- Meeting Minutes

  The minutes of any meeting that the non-agency team member was invited to attend.

- Meetings

  A calendar (or list) of the meetings that have been scheduled to discuss issues relating to the outcome plan.

- Discussions

  A discussion board where members of the multidisciplinary team can discuss issues relating to the outcome plan.

- Attachments

  A list of the documents attached to the outcome plan by agency and non-agency team members that have been shared with the non-agency team member viewing the collaborative outcome plan.

- Team

  Details of the members of the multidisciplinary team assigned to the outcome plan.

Collaborative Investigation Case

The Collaborative Investigation Case is a type of SEF used to allow non-agency multidisciplinary team members collaborate with agency workers in the investigation of allegations made against one or more clients. A collaborative investigation case is automatically created by the system in response to the creation of a new investigation where sharing has been enabled for that particular type of investigation.

A collaborative investigation case may not be created manually and may be accessed solely by non-agency multidisciplinary team members via the MDT Portal. It represents the non-agency multidisciplinary team members view of an investigation. Agency workers use the actual investigation case and do not use the collaborative investigation case. Only a subset of the information available in the investigation case is available in the collaborative investigation case. The information available in the collaborative investigation case depends upon several factors, however most important among these factors is *sharing*. Sharing can be configured for investigation notes and attachments. A non-agency multidisciplinary team member can only view the notes and attachments that an agency worker has specifically indicated can be shared with the non-agency multidisciplinary team member.

Configuring an Investigation Case for Sharing

Each type of investigation can be configured using the Cúram Administration Application to have sharing either enabled or disabled. If sharing is enabled, a multidisciplinary team can be assigned to the investigation and upon creation of an investigation case a collaborative investigation case is also created to allow the non-agency members of the team to collaborate in the investigation of the allegations associated with the investigation. Two types of multidisciplinary team may be associated with a particular type of investigation:

- Predefined

  The multidisciplinary team may be a predefined in the Cúram Administration Application. The investigation user can add a team to the case, however the user is unable to make any modifications to the make up of the team, i.e. new members cannot be added to the team or existing members may not be removed from the team by the user of the investigation. The team make up may be changed by an administrator and any updates to the team will automatically be available to any investigation to which the team has been assigned. A history of the changes made to the team is available within the investigation. In addition, a history of the teams assigned to the investigation is also available if more than one team has been used to deal with the investigation.

- Ad Hoc

  A multidisciplinary team may be created by the user of the investigation specifically to meet the needs of the particular case. The user can add both agency workers and non-agency workers to the multidisciplinary team and can select the team member to fulfill the lead role. A history of the make up of the team is retained, i.e. when members have been added and removed from the team.

Once assigned to a multidisciplinary team, a non-agency team member can access any collaborative investigation cases to which the team have been assigned via the MDT Portal. However, there are several factors that determine the actual information within the collaborative investigation that the non-agency team member can view. Principle among these factors is *sharing*. Sharing may be applied to notes and attachments and is based on the governance model configured using the Cúram Administration Application (for more information see Multidisciplinary Teams section).

If sharing has been enabled, in addition to the creation of a collaborative investigation case, a *Collaboration* navigation tab is added to the investigation case navigation bar. The Collaboration tab contains the following two pages;

- Multidisciplinary Team

  The content and functionality of this page depends upon the type of team that can be added to the investigation, i.e. predefined or ad hoc. Please see above for a description of the available functionality.

- Discussions

  A list of discussions that have been raised concerning the investigation.

The Collaboration tab, and thus the pages contained within, are not displayed in the investigation case if sharing is not enabled.

Sharing Notes & Attachments

Notes and attachments are shared in a similar manner. If sharing is enabled for an investigation case, when a new note or attachment is created, the agency worker is given the option of selecting the non-agency members of the multidisciplinary team with whom the note or attachment can be shared. This list of non-agency members is only displayed on investigation cases where sharing has been enabled. The list will contain only those members of the team with whom the item can be shared. For example, an agency may not want to share investigation case notes with non-agency multidisciplinary team members of a particular role. Therefore, any team member who fills this type of role will be excluded from the list. The note or attachment will be shared with each team member from the list selected by the agency worker. An email will be sent to the non-agency multidisciplinary team member informing them of the addition of the new item to the outcome plan. The team member can click on a link in the email to open the MDT Portal, where after supplying the correct authentication information, they can view the details of the new item added to the investigation case.

Non-agency members of a multidisciplinary team can also add notes and attachments to a collaborative investigation case. They cannot choose the other non-agency members of the multidisciplinary team with whom the item will be shared. This is the role of the investigation case owner. When a note or attachment is added to a collaborative investigation case, it is in effect added to the investigation case. The investigation case owner is notified by the system of the addition of the new item. The investigation case owner can review the item and determine the other non-agency members of the multidisciplinary team with whom the new item should be shared. The selected non-agency members are informed of the addition of the new item and can view the item via a collaborative investigation case in the MDT Portal.

Collaborative Investigation Case Features

- Notes

  A list of the notes recorded by agency and non-agency team members that have been shared with the non-agency team member viewing the collaborative investigation case.

- Meeting Minutes

  The minutes of any meeting that the non-agency team member was invited to attend.

- Meetings

  A calendar (or list) of the meetings that have been scheduled to discuss issues relating to the investigation case.

- Discussions

  A discussion board where members of the multidisciplinary team can discuss issues relating to the investigation case.

- Attachments

  A list of the documents attached to the investigation case by agency and non-agency team members that have been shared with the non-agency team member viewing the collaborative investigation case.

- Team

  Details of the members of the multidisciplinary team assigned to the investigation case.

(deprecated) Cúram Case and Participant Index (CPI)

(deprecated) The Goals of CPI

To keep up with technological advancements, social enterprise agencies have been faced with the large task of modernizing their systems.

For the most part, this has consisted of using new technologies, like the internet, to deliver single benefits to individuals. The trend of implementing applications on a per program, per individual, per social service agency has remained, thus resulting in applications with more sophisticated technology but which continue to be siloed, inaccessible to each other.

The main goal of CPI is to break the barriers between the siloed applications by providing a central data index repository for case and client information. Social enterprise agencies and service providers can use CPI to access information across different systems for a single client or for an entire family resulting in a holistic view of the family's complex needs. CPI can also assist social enterprise agencies in modernizing their systems by making information stored in legacy systems available to the modern systems.

By interfacing with Social Enterprise Folders (SEF) and the Citizen Context Viewer (CCV), the CPI provides a hub for social enterprise agencies from which they can collaborate their efforts in helping clients and their families. For information on how social enterprise folders and the citizen context viewer use CPI, see "Social Enterprise Folder" on page 7.

(deprecated) How CPI Works

The three main functions of CPI are to:

- Provide a data repository where data from the different systems can be stored
- Allow for systems (Cúram and non-Cúram) to search for data stored in the CPI data repository and return search results
- Support the retrieval of data from the CPI data repository and display the information in the social enterprise folder and citizen context viewer

(deprecated) Store Data from Systems in CPI

The main function of CPI is to provide a data repository for storing information across multiple systems. Each one of these systems must be set up to deliver its data to CPI. Out-of-the-box, CPI is designed to store the following data types:

CPI Data Type	Description
Table 3. CPI Data Types	
Person Details	Contact information (email address, phone, etc.), data of birth, social security number
Person Relationships	Relationship type, e.g., spouse, parent, sibling, name of the system where the relationship information is sourced from, e.g. Cúram, Legacy
Case Details	Case type, case start and end date, case status, case owner and owner contact details, name of the system where the case information is sourced from, e.g. Cúram
Case Member Details	Member type, person identification number from external system

The IBM Cúram Social Program Management Platform and Social Enterprise Collaboration (SEC) provide sample configurations for how information gets moved from a system to the CPI repository. Information recorded in IBM Cúram Social Program Management Platform and the SEC is moved to the CPI data repository.

(deprecated) Search for Data Stored in CPI

Any external system linked to the CPI data repository can search for and locate cases and persons based on a subset of criteria. Each piece of data stored in CPI is assigned a CPI identification. Matching mechanisms can be configured to limit the duplicate records displayed based on matching criteria. For example, person searches can return person records from all systems linked to the CPI. Matching criteria such as a name, social security number, and address can link related person records. These records can then be filtered based on their source systems, i.e., the system linked to CPI containing the record.

(deprecated) Retrieve CPI Data and Display

Social enterprise collaboration provides a forum for sharing information stored in the CPI data repository. It displays information across agencies and systems providing a holistic view of clients and their families. The majority of information stored in CPI (and described in Table 3 on page 18) is made accessible in the social enterprise folders and in citizen context viewers. This information can be used by agencies to make informed decisions on a family's behalf.

Cases and family members whose information is stored in external systems can be added as clients and cases in a social enterprise folder. These clients and cases can be used in collaborative work efforts. Relationships between persons whose records are mastered in different systems can be recorded within

social enterprise folders. For example, a family member retrieved from a legacy system can be added as a client in a social enterprise folder. The relationships between the new client and existing clients in the social enterprise folder can also be recorded.

(deprecated) Using CPI Configuration to Support Modernization

CPI works with a collection of systems in flux and can be used to help agencies gradually migrate from legacy systems to the Cúram platform. It achieves this by providing configuration options to turn off or on aspects of CPI. This allows certain types of data to be constant while other types of data are being migrated. For example, CPI can be configured to display person information but not case information. Agencies can focus on migrating person information into the Cúram platform without having to contend with case information. Another benefit is the ability to migrate from legacy systems to Cúram on a program-by-program basis. For technical information on using CPI to support modernization, see the `Case Participant Index Developer Guide`.

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