IBM Cúram Social Program Management
8.0.2

Cúram Calendaring Guide

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Note

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Edition

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Chapter 1. Cúram Calendaring Guide

User calendars are used to maintain user meetings and activities. Integrated case calendars track activities and events across cases and clients. Product delivery case calendars track activities and events that are recorded during the product delivery case lifecycle. Administration calendars track the organization's activities, holidays, and financial services.

To better understand the topics covered in this guide, read the `Cúram Integrated Case Management Guide` and the `Cúram Participant Guide`.

About the Application Calendars

A calendar is a collection of events, activities, and meetings. It can refer to an organization, users, and cases, or it could be a collection of data serving a more specialized need. The application calendars are the basic storage containers for calendaring information and they aid users in maintaining schedules and activities.

The application calendars are used to schedule events, activities, meetings and holidays. Activities can be set to occur once, or recur daily, weekly, or monthly. The following calendars types are available:

- User
- Case
- Organization
- Location
- Financial

User Calendars

User calendars are used to schedule and maintain meetings and activities for the users of the organization. Meetings are appointments about a client or a case to which other users or participants can be invited. Invitations to all parties are sent via Personal Information Manager (PIM) tools such as Microsoft® Outlook. The invite appears in the invited user's calendar where they can accept or reject the invitation.

Activities are scheduled events related to a case, and can be used as a way of setting up an event on a user's calendar to block out time for interaction with participants in a case. Activities can be scheduled to occur once or to recur at a specified frequency. For example, a case worker schedules a recurring activity for supervised visitation between a child and the child's parents. The caseworker creates an activity to block the time out on his or her calendar to engage in the activity, the child is set as the concerning participant, and the two parents are invited as activity invitees.

The user's homepage also provides a summary view of their meetings and activities on a given day. This display is defaulted to appointments for today's date. In addition, the user has the option to select and view meetings and activites for a day that falls within the current or next calander week.

Case Calendars

Case calendars are used to track the case events of the organization's clients. Case calendars provide a collaborative view of a client's activities and meetings and also provide access to calendaring information about a client's cases and family members. Case calendars also allow the users to schedule meetings to address the needs of clients and their families.

There are two types of case calendars: integrated case calendars and product delivery calendars. Integrated case calendars are used to track activities and meetings created at the integrated case level. Product delivery calendars are used to track case events and meetings created at the product delivery case level. Calendaring information maintained for product deliveries is kept separate from the integrated case as product delivery cases are cases in their own right.

Users can choose to create a calendar event of any of the following types from an integrated case or product delivery case:

- activity
- recurring activity
- meeting
- referral
- review

Calendars are also provided for investigations and issues that can be created from within an integrated case. Additionally, an appeal can be created from a product delivery calendar and issue calendar.

Integrated Case Calendars

An integrated case provides a holistic view of all of the benefits and services being delivered to clients within the product delivery cases associated with the integrated case. Integrated case calendars are used to track the activities and events that are relevant across the cases and clients of the integrated case.

Events of significance to an integrated case may be manually created by a user. These include case referrals and case review events. For example, a user can create a case review event in an integrated case for the purposes of reviewing how well the benefits and services being delivered in individual product delivery cases are integrating together to meet the needs of the family.

Integrated case calendars are also used to schedule activities and meetings for users and participants concerning a case or client. An integrated case calendar allows the organization to consolidate and track integrated case event information for the organization's clients.

Product Delivery Calendars

A product delivery case contains all of the information and functions that are needed to determine benefit eligibility and to deliver these benefits to the organization's clients. Product delivery case calendars are used to track the activities and events that are recorded during the different stages of the product delivery case lifecycle. Activities and meetings can also be scheduled concerning a case or a client from this calendar.

The events recorded during the different stages of the product delivery life cycle are either manually created by a user or are system generated as a result of case processing. For example, a case worker can manually create a case referral to schedule a medical examination with a physician who is registered as a service supplier for a person with disabilities.

Examples of some of the system-generated events are:

- Case decision
- Case approval
- Case payment date
- Case closure

Some events can be scheduled both automatically and manually. For example, a user can schedule a case review manually or a case review schedule can be set up where case reviews will be automatically created upon case approval based on the schedule.

Administration Calendars

Administration calendars are used to track the organization's activities, holidays, and financial services. There are three types of calendars in this category: organization calendars, location holiday calendars, and payment processing calendars. Organization calendars are used to manage organization-wide activities. Location holiday calendars are used to manage the holidays assigned to locations. Payment processing calendars are used to manage the payment exclusion dates for different delivery methods. The following sections describes these different calendar types.

For more details on each of these calendar types, please consult the the `Cúram Location Administration Guide` and the `Cúram Organization Administration Guide`.

Organization Calendars

Organization calendars are used to schedule and maintain activities for all the users within the organization. Organization activities are not related to participants or cases. Attendees cannot be invited to such activities. Organization activities apply to all users and as such are displayed on the organization activity calendar and a user's individual calendar, making it viewable by all users within the organization. Activities can be scheduled to occur once or they can be scheduled to recur at a specified frequency.

Location Holiday Calendars

Location holiday calendars keep a record of dates on which a specific organization location is closed. If a location has sub-locations associated with it, then holidays can be assigned to its sub-locations as well. Location holidays are displayed in the user calendars of all users assigned to that location and any sub-locations if the holiday is configured to apply to sub-locations.

Payment Processing Calendars

Payment processing calendars are used to record exclusion dates for a delivery method. Exclusion dates represent the days on which an organization will not be in a position to make payments using a particular delivery method. Payment processing calendars are beneficial to the agency in tracking the exclusion or non-processing dates that will be entered by the organization at the start of its fiscal year to take account of any of their non-working days.

User and Case Calendar Meetings

Calendar meetings functionality is an essential tool for the organization in the day to day work of the user providing for the needs of clients. This section describes how the application calendars are used to manage meetings, including how they are scheduled, and how they can be associated with cases and clients. The section also describes the integration of the application's meetings functionality with external email accounts.

Meetings Overview

Meetings are appointments scheduled by an agency worker concerning a client or a case to which other users or participants are invited. Various people can be invited to meetings including clients, agency workers, and other persons who play a role on a case, such as a witness to an incident.

The purpose of meetings can span a range of goals including:

- Sharing case information with involved professionals and determining an appropriate course of action for a family.
- Allowing team members to thoroughly review all aspects of a case and gain an understanding of the case complexity.
- Providing users and stake holders with an opportunity to discuss general issues, problems, and concerns related to the investigation and completion of cases.

Scheduling a Meeting

Meetings can be scheduled from a case or user calendar. When scheduling a meeting, the meeting organizer can specify information about the meeting such as the location and start and end time of the meeting, as well as invite attendees. When individuals are invited to a meeting, the system automatically sends a meeting request to all of the invitees for which a valid e-mail address is available.

PIM integration with the application's meetings functionality enables meeting requests to appear in the application calendar and external email accounts, for example, Microsoft Outlook. Meeting notes can also be recorded by the user when creating a meeting.

When a meeting is created from within a case, a case activity event is automatically created. The case transaction log is also updated when a case meeting is created, or modified. Meetings created from within a case are automatically associated with that case. When a meeting conflict with an existing meeting is detected for an invitee an informational is displayed to the meeting organizer.

Inviting Attendees to a Meeting

Any individual invited to a meeting who has a valid email address will receive a meeting invite request via e-mail and can choose to accept, decline, or mark as tentative the meeting using his or her PIM calendar. If an invitee does not have a valid email address recorded, no meeting request will be sent to the invitee and an informational message will be displayed to the meeting organizer.

When a meeting is created from a case calendar, the user can choose to invite the primary client for the case, other case members, and other users or participants involved with the case. Additional meeting attendees can be invited to the meeting after it has been created. In addition to selecting from a list of case participants and users related to the case, the user can also select from persons and users registered on the system, and can also specify an email address for individuals not registered on the system.

One of the benefits of issuing meeting requests is the ability for potential meeting attendees to store the scheduled meeting not only in their application calendars but also in alternative email accounts, for example, Microsoft Outlook.

Rescheduling Meetings

Meetings can be rescheduled. This can be done by editing the existing meeting date and time. When a meeting is rescheduled, emails are sent to all persons invited to the meeting, even persons who have declined the original invite. Invitees can accept, reject, or mark as tentative the newly rescheduled meeting.

Updating the Details of a Meeting

Updates can be made to meetings after they have been created. Meeting details including timing and content can be modified. Invitees are notified of any changes made to a meeting via an updated meeting notification.

Canceling a Meeting

Meetings can be canceled by the meeting organizer. When a meeting is canceled, all individuals invited to a meeting will receive a meeting cancellation notification via e-mail and can then remove the meeting from their PIM calendar.

Accepting a Meeting Invite

Attendees can accept a meeting invite from within their PIM tool. When a user accepts or rejects a meeting request, the meeting is updated with their acceptance or rejection and the meeting organizer can view this from within the meeting details for the meeting.

Recording Meeting Minutes

The record meeting minutes wizard assists users in capturing the details of a meeting that has occurred. The information can then be shared by 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 during the intial recording of meeting minutes and updated later after the meeting minutes have been recorded. Meeting minutes can be recorded for a meeting created from user and case calendars.

The following meeting information can be captured:

Meeting Details
> Meeting details includes the meeting subject, location, start and end date/time. Also included is the name of the person who organized the meeting and the meeting agenda. Any information entered as part of scheduling the meeting will be prepopulated in the meeting details.

Meeting Notes
> Meeting notes can be recorded in rich text format.

Meeting Decisions
> Meeting decisions can be recorded in rich text format.

Meeting Attendance
> Meeting attendees can be added to the meeting attendees list to capture individuals that were not initially invited to the meeting but ended up attending the meeting. These additional attendees can be added after the meeting, along with their email addresses, to allow for meeting minutes to be issued to them. Whether or not an attendee attended the meeting can also be captured.

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 for the user responsible for the action and is viewable from a user's inbox. Comments may be added to actions, and an action may also be closed when it is completed.

Meeting Files
> Files can be attached to meeting minutes. File attachments are then accessible when viewing the meeting minutes.

Meeting Minutes Summary
> The Meeting Minutes Summary is a summary of the meeting minutes information recorded.

Once the meeting minutes are recorded, they may then be viewed and updated as necessary from the user and case calendars, as well as from a list of meeting minutes that have been created. From this list of meeting minutes, a user may also record meeting minutes for an existing meeting for which meeting minutes have not yet been recorded, or may create a new meeting and record meeting minutes for the newly created meeting.

Meeting minutes can be issued by the meeting organizer to the meeting attendees. By default, meeting minutes are issued via email with the minutes in an attached PDF document; thus email addresses are required. An informational message 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 and to whom. Each time a version of meeting minutes are issued, the meeting minutes are base-lined. This allows users to view the actual minutes as they were at the time of issue.

Meeting Minutes Sensitivity

Given the nature of the sometimes sensitive case and participant information that users deal with on a daily basis, it is important to be able to limit access to such information. Meeting minutes have a sensitivity rating which can be used for this purpose. Meeting minutes can have a sensitivity rating of 1 to 5, where 1 means that all attendees can view the minutes. Meetings with a sensitivity of 2 can only be viewed by users with a sensitivity rating of 2 and above, and so on. The sensitivity on the meeting minutes record can be set to a value equal to and less than the logged in user or equal to or higher than the client involved in the meeting with the lowest sensitivity rating.

Integrating Meetings with External Email Accounts

PIM integration with the application's meetings functionality enables meeting requests to appear in an attendee's external email account and calendar, for example, Microsoft Outlook. This means that any person invited to a meeting who has a valid email address can receive a meeting invite and choose to accept or decline using his or her PIM calendar without having to log into the application. Meeting invites can be accepted resulting in a reminder being added to the application calendar and to the meeting attendee's PIM calendar, for example, a Microsoft Outlook calendar.

Within the application calendar, a confirmed invitee is marked as accepted. Invitees are marked as declined when the invite is declined. For invitees that decline, the meeting still appears in their application calendar (marked as declined), but will not appear in their email PIM calendar. Invitees that are tentative for a meeting are marked as tentative in their application calendar and in their PIM calendar.

User and Case Calendar Activities

An activity is an event scheduled for a specific time period. An activity calendar is maintained for the scheduled activities for individual users and cases. Activities allow for the identification of a concerning participant. Individuals (users and participants) can be invited to an activity, but invites will only appear in user calendars where they can accept or reject the invitation. Unlike meetings, minutes cannot be recorded for activities.

Scheduling User Calendar and Case Activities

Activities can be created by a user from their calendar. User activities can be related to a concern or a case and a client can be set as the concerning participant. Activities can be scheduled to occur once or to recur at a specified frequency. For example, a user within the organization may schedule an activity with the primary client on a case and a family member of the primary client.

User activities are specific to an individual user only and are displayed on the individual user's calendar. However, activities related to a case are also displayed on the integrated case events calendar. When scheduling an activity, the activity organizer can specify whether the activity should be taken into account when resolving upcoming calendar conflicts. This is done using a 'Show As' option which allows the activity organizer to display the activity as busy, free, out of office, or provisional.

A location can be specified for an activity. The user can search for and choose a location from the list of the locations for the organization.

If an activity created within a user calendar is related to a case, the meeting organizer can search for and select the related case. When searching for a case, the following can be specified:

- client reference, for example, passport number
- case name, for example, assistance
- case status, for example, active
- case start and end dates

Case results can also be filtered by cases with investigations or issues.

Inviting Attendees to Activities

When a standard or a recurring activity is created, participants and users can be invited to the activity. All users that are invited to the activity are automatically notified by the system via their personal calendars and can accept or decline the invitation from there. Any conflicts between existing activities or meetings scheduled for a user and the planned activity are automatically displayed. The user can then choose to reschedule the activity or ignore any time conflicts that occur.

Associating a Concerning Case and Participant with an Activity

Activities can be associated with a case. When an activity is created in a user's calendar, the user can associate the activity with a case reference number. When an activity is created and associated with a case reference number, an activity event is created for the related case.

When an activity is first created from within a case, the user can select a concerning participant from a list of case participants. Similarly, when an activity is first created from the user calendar, the user can search for and select a concerning participant. After the activity has been created, the user can change the concerning participant by searching for and selecting another registered participant.

Scheduling Recurring Activities

Recurring activities can be created in the same way as once off activities. Recurring activities can be managed as a series or per instance of the activity. When a user selects to view a calendar item that was created as part of a recurring activity, they have the option to either modify the details of the entire series of the recurring activity or modify the details of the particular instance of that recurring activity selected. A recurring activity cannot last longer than 1 day.

Calendar Reviews, Referrals, and Appeals

Both case calendar reviews and referrals can be scheduled from a case calendar. Reviews are examinations of a case by another user. Referrals are used to refer a case participant to an outside service supplier. Appeals are used when disputing a certain aspect of a benefit being provided within a product delivery case, for example, if a service provider provides an unsatisfactory service to a client.

Case Reviews and Referrals

Both case reviews and referrals can be scheduled and maintained from the case calendar. A case review is an examination of a case by another user. Case referrals are requests to a service supplier for consultation on an integrated case or product delivery.

Scheduling a Review

When creating a review, the user can search for and select a suitable reviewer. Detailed rich text comments can be added to the review task, as well as the reason for the review. A start date must be set for the review. A projected end date may optionally be set. When a case review is created for a case, the user who will conduct the case is notified with a task. Case reviews are displayed on the concerning case calendar and can be accessed from the reviewer's inbox.

Scheduling a Referral

Case referrals can be created from the case calendar. When scheduling a referral, the user can search for and select the service supplier. The referral type must be specified, as well as a start date for the referral. An expected end date for the referral can also be entered.

Product Delivery Appeals

Appeals can be created from the calendar of a product delivery case. Product delivery case appeals are used to manage disputes against service providers who are providing services to the organization's clients. The service supplier who is the focus of the dispute can be searched for and selected. An appeal type can also be selected, for example, conditions for disqualification, payment rate, etc. An expected start and end date must be specified when creating an appeal. An outcome can also be recorded for the appeal.

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