IBM Cúram Social Program Management
Version 7.0.2

Cúram Citizen Context Viewer Guide

Note

Before using this information and the product it supports, read the information in “Notices” on page 6

Edition

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Chapter 1. Cúram Citizen Context Viewer Guide

The Citizen Context Viewer provides a summary of a wide-range of client information in a single browser. When used with the Cúram Case Participant Index, information can be retrieved from multiple systems, thus providing a holistic view of clients.

Introduction

Purpose

Note: Cúram Case Participant Index (CPI) is deprecated. For more information, see Deprecated features.

The purpose of this guide is twofold. It provides a business overview of Cúram's Citizen Context Viewer (CCV) while also providing insight into using the CCV to achieve business objectives.

The CCV displays a summary of a wide-range of client information in a single browser. When used in conjunction with the Cúram Case Participant Index (CPI), information can be retrieved from multiple systems, thus providing a holistic view of clients.

Audience

This guide is intended for any reader interested in understanding the business concepts of CCV.

Prerequisites

Note: Social Enterprise Folders (SEF) and Case Participant Index (CPI) are deprecated. For more information, see Deprecated features

The Cúram Citizen Context Viewer (CCV) integrates with Cúram participants and cases; therefore, the *Cúram Participant Guide* and *Cúram Integrated Case Management Guide* are reading prerequisites.

The CCV also works in conjunction with **Cúram Social Enterprise Collaboration** and **Cúram Outcome Management** components including social enterprise folders, outcome plans and multidisciplinary team members. The *Cúram Social Enterprise Collaboration* guide and the *Cúram Outcome Management* guide are additional reading prerequisites.

Chapters in this Guide

The following list describes the chapters within this guide:

Citizen Context Viewer Business Architecture
This chapter describes the business architecture of the CCV.

Using the Citizen Context Viewer
This chapter describes the best practices for using the CCV to achieve business objectives.

Conclusion
This chapter provides a summary of the CCV business concepts described throughout the guide.

Citizen Context Viewer Business Architecture

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Introduction

Note: Cúram Case Participant Index (CPI) is deprecated. For more information, see Deprecated features.

The main goal of social service agencies is to provide for their clients in the most effective and beneficial way. Clients can be involved in one or more programs with multiple agencies and can have one or more family members who also interact with the agencies. The business architecture of Cúram's Citizen Context Viewer (CCV) offers a collaborative view of a client and provides quick access to detailed information about a client's cases and family members. The CCV is fully integrated with the Cúram Case Participant Index (CPI), displaying client information across systems (Cúram and non-Cúram).

Holistic View of Client in Central Location

The Citizen Context Viewer (CCV) helps an agency gain a more complete and accurate picture of families and individuals by providing a single point of entry for navigating to client information from all agencies delivering services. Through the CCV, agency caseworkers can easily see:

- Who else is dealing with the clients including multidisciplinary team members and social enterprise agencies
- What benefits and services the clients are receiving
- What contact clients have had with social enterprise agencies and multidisciplinary team members

Without CCV, accessing information about clients and their family members in the application can require prior knowledge about the client and an understanding of navigating the application. Using CCV, users can access all information about a client without requiring extensive knowledge of the application. With less time spent navigating the application in search of information, the CCV user can focus on learning about the client. At the same time, since the CCV opens in its own pop-up window, it can easily be used in conjunction with the application. Users can navigate across the application and return at any point to the client-centered view.

The CCV not only provides a holistic view of a client, it also provides a holistic view of each of the client's family members. CCV users have the option to view client information for each family member in the same CCV or else users can open a new CCV for each family member. Both options make it easier for agencies to compare information across families. Agencies can determine whether or not someone in a family is receiving a particular benefit from any number of agencies, reducing the risk of a family fraudulently collecting for the same benefit more than once.

Comparing client information for family members can also assist in early interventions. For example, in families where there is a risk of child abuse or neglect, the agency can use the CCV to view any assessments for older siblings. These assessments may detect a pattern in the family, such as a progression from child services to juvenile justice, eventually leading to a long-term dependency on social services. Under these circumstances, the agency can decide to intervene early for younger siblings in order to break the cycle of dependency.

Viewing Client Information across Agencies

Note: Cúram Case and Participant Index (CPI) is deprecated. For more information, see Deprecated features.

The Citizen Context Viewer (CCV) displays client information across agencies providing caseworkers with a complete view of a claimant's claim history. Integration of information across agencies is facilitated by the Cúram Case and Participant Index (CPI). CPI is a central data repository for storing and managing core participant details used in Cúram and non-Cúram systems. Using CCV with CPI, agency workers can quickly access a client's case history across agencies and view detailed information about family members stored across systems.

CCV Components

The CCV is a tree structure which opens in a pop-up window so that it can be used in conjunction with the application. At the top of the CCV is an image of the CCV client (if available) and his or her personal details. Each one of the components that make up the CCV structure groups together aspects of client information including a client's cases, client communities, family relationships, client interactions, and multidisciplinary teams who act on behalf of clients.

Care & Protection Component

Note: Cúram Case Participant Index (CPI) is deprecated. For more information, see Deprecated features.

The care and protection component displays a summary of a client's programs (examples of programs include food stamps, Temporary Assistance for Needy Families (TANF), unemployment insurance benefits, medical assistance). Using CPI in conjunction with Citizen Context Viewer (CCV) enables agency workers to see a history of a client's programs across agencies, thus providing a holistic view of the client. The information displayed for each program includes the program status, the primary client, if relevant, and the program reference number.

Caseworkers can use this component to identify other programs or other organizations that are more suited to fulfilling the claimant's needs and facilitate the claimant to become more self sufficient and eventually less reliant on social welfare. This component can be used to identify trends within families and use this information to intervene at an early stage. For example, a common pattern in families is for siblings to move from child welfare programs to juvenile justice programs, and social welfare programs in their adult years. By detecting this pattern early, agency workers can intervene for younger family members, thus breaking the cycle of dependency.

Communities Component

The communities component displays the communities that the Cúram Citizen Context Viewer (CCV) client is a member of. The classification of a community is dependent on the case or benefit.

Note: Social Enterprise Folders (SEF) and Case Participant Index (CPI) are deprecated. For more information, see Deprecated features

For example:

- Food Stamps, the community, is the Food Stamps Household.
- Temporary Assistance for Needy Families (TANF), the community, is the TANF Household.
- Social Enterprise Folder (SEF), the community, is all the clients that have been added to the SEF.

Family Component

Note: Cúram Case Participant Index (CPI) is deprecated. For more information, see Deprecated features.

The family component shows a client's relationships. One of the main benefits of integrating Cúram Case Participant Index (CPI) with Citizen Context Viewer (CCV) is the ability to see information about family members across agencies. This allows agency workers to view information about family members who are not part of the household, for example, absent parents. The CCV view can be changed to display information for any family member. For example, an agency worker can select an absent parent and see if that parent is in receipt of payments for programs from other agencies.

Dealings Component

The dealings component displays interactions between the CCV client and the SEM agency. It provides summary details of all the client's communications and payments thus forming an overview of a client's contacts with the agency.

Multidisciplinary Team Component

The multidisciplinary team component displays all multidisciplinary team members who are responsible for helping the CCV client. Multidisciplinary teams are groups of professionals from diverse disciplines, for example, government agents, private practitioners who come together to provide comprehensive assessment and consultation in cases such as child abuse and fraud investigation. Their primary purpose is to help team members resolve difficult cases. The CCV provides effective means for viewing the MDT members working on behalf of a client and for viewing their contact details.

CCV Customization

One of the benefits of the CCV is the ability to configure the CCV components dynamically as part of system administration. These configurations primarily determine the client information that should be displayed. For example, the option is provided to only display cases of selected statuses. For more information, see the `Cúram Citizen Context Viewer Configuration Guide`.

Customization support is also provided which enables agencies to change the client information displayed at the top of the CCV, to add CCV components, e.g., an employment history or a financial history, and to define the case communities.

Using the Citizen Context Viewer

Introduction

This chapter provides an overview of using the citizen context viewer. When the CCV is launched for a social enterprise client, it opens in its own window allowing for ease of use in conjunction with the application.

Within the CCV, there are navigation options which are designed to compliment an agency's business requirements. These options include the ability to view additional CCV clients and to view more information about a specific client.

While the CCV opens in its own browser, it's session is linked to the CCV user's application login. The system checks the CCV user's security settings before launching the CCV and only displays client information that the user is authorized to view.

Launching the CCV

Note: Social Enterprise Folders (SEF) and Case Participant Index (CPI) are deprecated. For more information, see Deprecated features

By default, the Cúram Citizen Context Viewer (CCV) can be launched for each client within a social enterprise folder either from the list of clients on a social enterprise folder home page or from the clients list page. The CCV is also launched by selecting an icon on the image displayed for a client in the application.

Using the CCV

By design, the CCV has been sized so that CCV users can view the information in the CCV in conjunction with information in the application. This allows the CCV user to navigate back and forth between the client-centered view of the CCV and the more detailed information stored in the application.

The CCV can be used to assist social service agency workers in detecting client fraud. By retrieving information from Cúram and non-Cúram systems, the caseworker can detect if a client is attempting to collect the same benefits from different agencies and or within different jurisdictions.

The CCV can also assist call center users in dealing with client queries. For example, if the client, Linda Smith, contacts a call center to enquire about a specific payment, the call center user can launch the CCV for Linda Smith and examine the list of interactions using the dealings component. The CCV provides a link to the payment instruction details page for each payment interaction.

Viewing Client Information for Family Members

The CCV allows users to view client information for family members by changing the existing CCV client or by opening a new CCV for each family member. To change the existing CCV client with a family member, the CCV user can drag and drop family members onto the top panel of the CCV. This will refresh the panel and the tree structure to display client information for that family member. Alternatively, the CCV user can right-click on a family member and select the view citizen context option.

The ability to view client information across families can assist agencies in depicting family trends. For example, an agency worker can compare the programs for siblings within the same family. If an older sibling progresses from child services to the juvenile justice system, the agency may wish to investigate the underlying causes for this progression. Using this information, the agency may offer younger siblings support so that they do not enter the juvenile justice system.

Using the CCV to Manage Clients and Cases

A feature of the CCV is the ability to manage the clients and cases for a SEF by dragging information from a CCV into the SEF. Cases displayed in the care and protection component can be dragged into the list of cases that make up a SEF. Similarly, the CCV client and family members can be dragged into the list of SEF clients. This feature reduces the manual effort and knowledge required of SEF caseworkers to manage SEF clients and cases. The CCV can also be used to manage the clients for an outcome plan. Clients displayed in the family node can be dragged to a list of clients that will make up the outcome plan.

User Security and the CCV

The CCV uses existing security settings to ensure that only authorized users can view client information. Case information is protected by case security, service plans are protected by service plan template security, and client information is protected by client sensitivity security. A user's security role must also include the necessary functions to be able to view the various types of information displayed in the CCV. For information on security, see the `Cúram System Configuration Guide`.

Additional sensitivity security has been introduced for social enterprise collaboration components such as multidisciplinary team members. A sensitivity level can be associated with these team members and CCV users can only view those team members whose sensitivity is equal to or less than their own.

In the CCV, the total records returned is displayed for each component. Information is provided for the records that are not shown based on a user's security access.

Conclusion

Summary

Note: Cúram Case Participant Index (CPI) is deprecated. For more information, see Deprecated features.

The following summarizes the main concepts of the Citizen Context Viewer (CCV) covered in this guide:

- The CCV provides an overview of a client's cases, communities, dealings, family, and multidisciplinary teams.
- The CCV also provides quick access to detailed client information.
- The CCV is designed to be easily used in conjunction with the application and additional CCVs.
- The CCV uses the Cúram CPI to display client information across agencies.
- The CCV can assist call center users in handling queries, can reduce the risk of fraud, and can help in early prevention.

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