IBM Cúram Social Program Management
Version 7.0.2

Cúram Evidence Guide

IBM

Note

Before using this information and the product it supports, read the information in "Notices" on page 29

Contents

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Chapter 1. Cúram evidence overview

A business overview of the main features of the Cúram evidence framework, how you can manage evidence with the evidence framework, and the business flow of evidence through the application.

Note: This information supersedes the *IBM Cúram Temporal Evidence Guide*. For information about using the Participant application without person and prospect person dynamic evidence , see the *IBM Cúram Temporal Evidence Guide*.

Related concepts
Cúram Integrated Case Management Guide
Cúram Participant Guide

Understanding Evidence

A description of the main features of the evidence framework, including the ability to maintain evidence at the application, person or prospect person, and case level, evidence sharing, and evidence verification.

What is Evidence?

Evidence is information supplied by participants which can be used to make an assessment or determination. For example, the date of birth of a person may be used to determine age qualification for a benefit or service.

Evidence can be captured and maintained for a person / prospect person within a number of areas. For example, information a person provides about themselves and their family when applying for assistance is captured as evidence and is viewed and maintained within their application case. When this application case is complete, they may be found to be eligible. At this point in the process, the evidence they provide in the application case is maintained as part of their ongoing integrated case. Evidence for persons can also be viewed and maintained through their person record.

Key Features

The key features of the evidence framework include:

- Configuration capability for evidence types including definition of maintenance locations for each evidence type
- Dashboard including filtering of evidence by 'recorded' view
- Evidence Flow displaying a graphical representation of all evidence types for a case
- Evidence capture options from Evidence Flow, Dashboard and list pages
- Evidence type relationships
- Corrections and changes in circumstances
- Optional evidence approval
- Evidence change history
- Evidence sharing between applications, persons, prospect persons and cases
- Evidence verification providing the ability to check the accuracy of information supplied
- Read-only property to protect an evidence record from change

Evidence Types

Evidence types represent the events and circumstances that need to be captured for case assessment purposes. Examples of evidence types include income, income usage, address, employment, bank details,

etc. An evidence record is a set of saved information entered for an evidence type. For example, an employment evidence record may include details about a person's job.

An evidence object is a collection of evidence records showing how a piece of information varies over time. For example, a person's employment evidence has changed twice over the years. This evidence object for employment evidence consists of three records - one record for the initial capture, and one for each change in circumstances.

Each evidence type may have several evidence objects associated with it. For example, if a person has two jobs, two different evidence objects are stored. These objects, plus the records for that evidence object, store all necessary information.

Evidence Corrections and Changes in Circumstance

Evidence maintenance supports two styles of evidence changes: evidence corrections and changes in circumstance.

Evidence Correction

An evidence correction is the replacement of an existing evidence record with a new evidence record in order to correct an incorrect piece of data. For example, a person may input their date of birth as part of a submitting an application online. When the caseworker interviews the client and verifies the date of birth, they find that the customer made a mistake on original entry of that information. The caseworker corrects the date of birth evidence by overwriting the existing date of birth with the correct one. All corrections made to evidence can be viewed for historical purposes. Caseworkers will be able to see when the change was made, who changed it and what the original value was.

Change in Circumstance

A change in circumstance is when data in an evidence record changes over time due to changes in circumstance. For example, evidence which captures a weekly income amount for a person may vary over time. When the income amount goes up or down, the caseworker can record when the income changed took effect.

This evidence pattern supports a succession of changes in circumstance to the same evidence object. For example, the set of changes to the income amount, each in succession of each other, collectively represent the changes to the income amount evidence object.

Read-Only Evidence Types

Evidence from a trusted source, such as medical records from a hospital, might need to be protected from modification by a user. An administrator can protect evidence records by making the evidence type read-only. Evidence records of a read-only evidence type cannot be modified or created by a user, but system processes can create or broker read-only evidence around the application. The worker can manually delete read-only evidence records.

Location of Evidence for Maintenance

Evidence is information a person / prospect person provides and is used in an application case through to ongoing cases. Therefore the evidence provided can be stored, maintained and shared in the application. The following sections detail the various locations where evidence can be maintained.

Person Tab

Person / prospect person evidence is evidence configured for persons and prospect persons and maintained within the person tab. The following evidence types are provided for a person/prospect person and available for use in the application:

- Addresses
- Bank accounts
- Birth and death
- Contact preferences
- Email addresses

- Gender
- Identifications
- Names
- Phone numbers
- Relationships

Note: The preceding evidence types are created using dynamic evidence.

The system immediately applies evidence that is maintained in the person tab to the person/prospect person evidence. This differs to case evidence management where the creation of new evidence or modifications to evidence cause it to become in edit until such time it is applied. If person /prospect person evidence is maintained on cases it is subject to the same processing as all other case evidence.

The evidence listed can also be configured on other case types. Configuring this evidence on a case, allows caseworkers to maintain all evidence in a single location for ongoing cases. For example, an integrated case contains all the evidence required to determine eligibility for products and services. The integrated case is typically used to maintain the evidence for a number of participants such as a family or a household. The case may include evidence such as income and assets for each member. By configuring the person /prospect person evidence at this level, caseworkers are provided with a more holistic view of the household. Not only is the program related evidence maintainable, but the personal details of the members can also be viewed and maintained without the need to navigate away from the case. Modifications made to the person/prospect person evidence from a case are shared to the person tab via evidence brokering.

Application Case Evidence

Evidence configured for an application case would include all the information captured during an intake process. Similar to evidence configured in the person tab, there is no in edit or active state as part of evidence maintenance. This is because until all programs being applied for are complete, the evidence is essentially deemed in an editable state. For example, during application intake, there may be further evidence that needs to be captured, verified or updated in order to determine eligibility for the programs being applied for.

The person and prospect person evidence types listed in the previous section can also be configured onto an application. Like the integrated case, this allows caseworkers to maintain all evidence relating to the application in a single place. Once an application is complete, any person/prospect person evidence configured for sharing, will be copied back to the person tab via evidence brokering.

Case Evidence

Case evidence can be associated with either a product delivery or an integrated case. Each case evidence record is associated with a person / prospect person for whom the evidence relates and with a case for which the evidence is used to determine entitlement.

When associated with an integrated case, it can be shared across multiple product delivery cases within that integrated case. Maintaining evidence at the integrated case level streamlines evidence maintenance.

For example, if income evidence is required to determine eligibility for multiple product delivery cases, the income evidence can be captured and maintained at the integrated case level in the one income evidence type list. Although maintained in the same evidence list, the impact that the evidence will have on the product delivery cases will be dependent on their own rule sets.

Note: The organization can choose to configure evidence maintenance so that several products share the same evidence type. The configuration of evidence types occurs as part of product administration and is discussed in more detail in the `Curam Dynamic Evidence Configuration Guide`.

(deprecated) Sharing Evidence

Note: This section applies only to evidence sharing with the evidence broker version 7.0.1.x and earlier, which corresponds to the value of the curam.aes.advancedEvidenceSharingEnabled property being set to

NO. See the Evidence broker section for information about how sharing occurs when the curam.aes.advancedEvidenceSharingEnabled property is set to YES.

The evidence framework provides the ability for agencies to share evidence between a person/prospect person, application case, and ongoing cases.

This ensures that clients do not have to complete the same information repeatedly and so that all associated agencies are informed when client information changes. Evidence Broker functions enable and mediate the sharing of evidence. The evidence broker acts as both a receiver and a broadcaster of new, updated and removed evidence. It allows the agency to compare evidence that is received from different sources and determine the appropriate action.

Evidence sharing is one directional and per evidence type. This approach means that different targets can receive and share an evidence type in different ways. If required, one case type might be able to receive shared evidence, but might not be able to share its own evidence

Three main business functions trigger the evidence broker to broadcast evidence:

- When a new person is added to a target case to which the evidence is shared. For example, if person evidence or prospect person evidence, for example, identification evidence, is configured for sharing to an integrated case and a person is added to the integrated case. The evidence broker first checks to see if that person is a person or prospect person. Then, the evidence broker checks for identification evidence. If identification evidence is found, then it is shared with the integrated case.
- When evidence changes are made to a source case (where the evidence change happens). For example, when changes are made to a persons identification evidence, the evidence broker shares those changes to the integrated case.
- When a new target case is created. For example, when a new integrated case is created, the evidence broker searches for person or prospect person identification evidence to be shared. If this evidence is found, the evidence broker shares the identification evidence to the integrated case.

For detailed information on the Evidence Broker, see the `Cúram Evidence Broker Guide`.

Verifying Evidence

Verification is the process of checking the accuracy of the information that is given by clients that are seeking services from a Social Enterprise organization. The verification of client evidence can take a number of forms; it can be provided by documents, for example,, birth certificates or bank statements, or by verbal means, for example, telephone calls. Cúram Verification provides a flexible verification module that allows an organization to define both the evidence that requires verification and the means by which that evidence can be verified.

Cúram Verification consists of three components; an administration component, a case component, and a participant component. The case and participant components of verification, allows caseworkers to record verifications for evidence. By default, when evidence is captured for a person / prospect person or a case, the Cúram Verification engine is called to determine whether any of the evidence data requires verification. It is possible to defer evaluation of verifications on evidence, which would result in evidence that is captured in an "unevaluated" state. This state is presented to a user on various evidence list pages, by placing a special icon that represents the unevaluated state, adjacent to the evidence. Unevaluated evidence means that the Cúram Verification Engine was not called when evidence was inserted and the system does not know whether any of the evidence data requires verification.

Evidence and case list pages are provided to assist caseworkers in fulfilling verification requirements. Caseworkers can also view verifications that are related to person /prospect person evidence from the person tab.

Related concepts
Cúram Verification Guide

Managing Evidence

A description of evidence management functions in the evidence framework. You can capture, validate, activate, view, and manage updates to evidence over time.

Evidence Lists

The evidence framework provides several evidence lists for managing evidence. Person /prospect person evidence is managed using the person tab evidence list, specifically designed for person /prospect person evidence. Application evidence is managed using the application evidence list and incoming evidence list. Case evidence is managed using evidence type list, active evidence list, in edit evidence list and incoming evidence list.

The evidence type list displays all evidence records on a case for one evidence type. The in edit and active evidence lists provide caseworkers with alternative views for maintaining evidence on the case. The in edit evidence list displays in edit evidence records on a case. The active evidence list displays active evidence records for a case and any changes made to those active records. The incoming evidence list displays evidence shared to this case via the Cúram Evidence Broker.

Evidence is displayed in the same format for each list; summary information is provided for each individual evidence record for a person including the period of time for which the evidence is applicable, the number of updates that have been recorded and the latest activity on that evidence. A second list within each business object provides a history of the successive changes to it over time. Details displayed include the period over which the change is effective and the reason a change has been recorded, as well as the date, time and user who made the change.

Person Tab Evidence List

The person tab evidence list provides caseworkers with a view of all evidence types configured for a person / prospect person. From this list, evidence records can be viewed, updated, and deleted. Person / prospect person evidence is automatically activated when saved on the person tab, hence only one list of evidence is required. The person tab evidence list displays the source of the evidence. The source indicates where the evidence was added or modified and displays either person record, prospect record or the individual case reference. The evidence records listed will always be the summary of the very latest record. When expanded, details of the latest update are displayed.

Application Evidence List

The application evidence list provides caseworkers with a view of all evidence in relation to a person / prospect person on an application. From this list, evidence records can be viewed, updated, and deleted. The application evidence list contains both the in-edit and active evidence for the application.

Evidence Type List

The evidence type list provides caseworkers with a central point for maintaining evidence of a particular type, displaying all evidence, verifications and issues for a single evidence type. Evidence can be viewed, deleted, discarded and, if not configured to be read only, updated. Pending updates and removals can also be undone, if necessary.

Unlike other evidence list pages, the evidence type list is opened in a new tab.

Deleted evidence can be displayed on the Evidence Type list view. To view deleted evidence, the application property to display deleted evidence must be configured. Deleted evidence can only be viewed there is no option to edit. By default, deleted evidence is not displayed.

Active Evidence List

The active evidence list provides caseworkers with a view of all active evidence on a case, including parent and child evidence. From this list, active evidence records can be viewed, deleted and if not configured to be read only, updated; additionally pending updates set on active records can be discarded, and pending removals set on active evidence records can be undone.

In Edit Evidence List

The in edit evidence list provides caseworkers with a view of all in edit evidence on a case. From this list, in edit evidence records can be viewed, edited, and discarded. By default, the in edit evidence list displays all of a case's in edit evidence records including parent and child evidence.

Incoming Evidence

The incoming evidence list provides users with a list of evidence that has been shared from other systems and cases to this case.

Shared evidence can be compared to existing evidence on the case, and caseworkers can use the actions provided to resolve the evidence onto the case.

Note that evidence can only be shared if the Cúram Evidence Broker is installed. For more information, see the `Cúram Evidence Broker Guide`.

Verifications List

The verifications list displays all of the verifications, both outstanding and captured, that are currently associated with participant or case evidence. A user can view the outstanding verifications and add a verification item to verify. A user can view all verifications that have been captured either in the participant manager or on the case. A user also has the ability to view and manage evidence verifications for a particular evidence type at the individual evidence type level.

Note that verifications are only available if the Cúram Verification Engine is installed. For more information on the functionality available for managing evidence verifications, see the `Cúram Verification Guide`.

Issues List

The issues list displays all of the issues currently associated with the evidence on the case. Case workers can use this list to resolve issues. The evidence issues are determined by the Advisor.

Navigating Evidence

Note: ⊟⊘EvidenceFlow is deprecated. For more information, see Deprecated features.

A caseworker has the option to view evidence at a case level in a dashboard view or EvidenceFlow view. Additional views are available at the evidence type and individual evidence object level, as well as the view of each piece of evidence.

Dashboard

The dashboard view provides a summary display of evidence for a case. The dashboard shows evidence by category to help a caseworker locate individual evidence types. Further information is available including whether there is any evidence in edit, any verifications outstanding or any issues for each evidence type. Each category offers additional flexibility for a caseworker with two different views of evidence

- all the evidence types that have been configured for that category on a case
- all evidence that has been recorded for the category

Evidence is displayed on the dashboard alphabetically and vertically within each category. Child evidence is shown as indented and italicized and is always displayed under its associated parent evidence. When an evidence type has been recorded it will be displayed as a hyperlink on the evidence dashboard. Child evidence types which are common to multiple parent records will be shown as recorded underneath the parent to which it has been associated with. The user can quickly add an evidence record by selecting the "+" symbol for an associated evidence type. This option will be available to select when the user rolls the mouse pointer over the evidence name they wish to add.

(deprecated) EvidenceFlow

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The **EvidenceFlow** view provides an alternate summary display and navigation through evidence on a case where each evidence type is represented by a tile. When a tile, or evidence type, is in focus then the list of evidence objects (and the successive changes to the object over time) for that evidence type are available.

The **EvidenceFlow** view is described in more detail in "(deprecated) Using the EvidenceFlow View" on page 13.

Evidence Object View

A view is provided for each evidence object which displays the latest details for the evidence and lists the successive changes to the object over time. Any additional data pertaining to the evidence object is available; if the evidence is a parent then a list of related child evidence is displayed, one list for each child evidence type. For example, income evidence is a parent of income usage evidence. A caseworker viewing income evidence will have the ability to view a list of income usage evidences relating to the income evidence.

If an evidence type is a child, the parent evidence will be listed. If an evidence type is a grandchild, only the child evidence will be displayed and not the parent evidence - the related evidences are available to one level of relationship (parent to child is one level, child to grandchild another level).

View Evidence

The view evidence page allows a user to view all the evidence details for a specific case evidence record. A caseworker also has the ability to view a list of evidence corrections for that evidence record.

Maintaining Evidence

This section describes the maintenance functions that are available within the evidence framework. These maintenance functions standardize evidence maintenance across all evidence types. A caseworker has several options for maintaining evidence at the person tab, case, evidence type and individual evidence object level. Person / prospect evidence can be added, modified and removed only from the person tab. All of the following maintenance options are applicable to case evidence.

Dashboard Groups

Evidence dashboard groups can be created to help users perform a specific task in regards to evidence maintenance. If an evidence dashboard group has been configured on a case then the user can select it via the "Display Evidence Group" combo box on the evidence dashboard. Selecting a dashboard group will filter the evidence dashboard so that it only displays the evidence types belonging to that group. Evidence types that have an asterisk are required as part of that evidence group. Evidence types which are flagged as required are used to prompt the user that the evidence type should be entered as part of the task this evidence group relates to. No validation will be thrown if a required evidence type is not recorded for an evidence group.

New Evidence
A caseworker can use the new evidence function to capture evidence information for an evidence type.

Creating new evidence

A caseworker can create either new person or new prospect person evidence through the person tab evidence list. A newly created person or prospect person evidence record has a status of active, and can be used for assessment purposes. It is not possible to create a new evidence record for evidence types that have been configured as read-only. However, as a result of evidence brokering, read-only evidence records might be present on the case, the person, or the prospect person.

While creating child evidence, a caseworker can select the parent evidence record. The system automatically creates a parent-child relationship between the two evidence records.

When a caseworker saves the evidence information, the system validates the information that the caseworker has entered. An administrator can customize the validations to match the business requirements for an evidence type.

To enable greater flexibility in gathering evidence and to allow information to be reviewed before it is activated, a newly created case evidence record has a status of in-edit and the record is not yet used for assessment purposes.

End dating previous evidence when creating evidence records

When a caseworker creates evidence, a caseworker can configure an evidence type so that evidence of the same type can be ended when creating new evidence. For example, when a customer informs an organization of a new address, caseworkers are required to create an address record and, also, to end the address that was currently on record. By configuring evidence to combine the creation and end dating of evidence, ending an evidence record is no longer a two-step process that requires unnecessary clicks and extra navigation.

When suitable evidence is configured and the criteria are met, the caseworker can end date evidence records when a new record of the same evidence type is created. The feature applies to both dynamic and non-dynamic evidence.

Administrators can enable the ending of previous evidence when caseworkers create evidence records for various evidence types, when the evidence matches the following criteria:

- The evidence has a business end date attribute, and the end date is the only mandatory attribute that must be populated to end date the evidence. For example, if the evidence requires other mandatory information to be populated to end date the evidence, such as comments, then the evidence is not suitable.
- The existing evidence creation step does not have a two-page modal, for example, parent-child.

The evidence end dating feature is enabled by default for suitable person evidence, for example, addresses and phone numbers. For information about whether the evidence end dating feature is enabled on other types of evidence, see the related link to the *Cúram Participant Guide Evidence* section, and review the appropriate topic. Administrators can enable the evidence end dating feature on other evidence types, including custom evidence types, as required.

When a caseworker creates evidence, a two-page wizard is displayed to the caseworker only when the following conditions apply:

- In the administrative settings, an administrator has configured the evidence type to enable ending evidence while creating new evidence.
- Existing active and in-edit evidence records of the same type already exist for a person or a case.
- The evidence type has a business end date attribute.

For information about configuring an evidence type to end date an existing evidence record when creating an evidence record, see the related link.

Evidence with a Preferred Indicator

When an evidence record uses a **Preferred Indicator** and if the preferred indicator is set, the evidence record becomes the preferred evidence record even when other evidence records of the same type exist on the case. Only one preferred evidence record of the same type is allowed. Therefore, when a new evidence record is created with the preferred indicator set, and a preferred record exists, the following action occurs. The **Preferred Indicator** on the existing preferred evidence record is automatically cleared, whether it is set to `active` or `in-edit`. Then, the auto-unchecking of the preferred indicator on the evidence creates an `in-edit` record of the evidence. The caseworker must then apply the changes.

Related concepts
Evidence
Related tasks
Enabling the End Dating of Previous Evidence When Creating Evidence
An administrator can configure evidence types to allow the caseworker to end date existing evidence when creating evidence, depending on requirements. By configuring evidence to combine the creation and end dating of evidence, ending an evidence record is no longer a two-step process that requires

unnecessary clicks and extra navigation. If the end dating feature is enabled for an evidence type, an end dating option is displayed in the evidence creation wizard for that evidence type.

(deprecated) Applying End Dating in the Creation of New Evidence Records
When caseworkers create evidence records, they can end date previous evidence records of the same type during the creation process, if an administrator has enabled the end dating feature for the evidence type. Caseworkers create an evidence record by recording the evidence in the first page of the evidence wizard. Then, if the end dating feature is enabled, a second page is displayed in the wizard where caseworkers can end date previous evidence records.

Modify Evidence

The modify evidence function allows users to update person / prospect person and case evidence, that has not been configured as read only. The evidence information that can be modified is specific to the evidence type. Person / prospect person evidence types maintained on a case are considered case evidence and are maintained using the evidence modification process for that case.

When evidence updates are saved, the system validates the evidence information. The validations for modifying evidence can differ from the validations applied when adding new evidence (even when changing the same information). For case evidence which is awaiting case supervisor approval, a special validation warns the user of the pending approval. Evidence records that have been approved by the case supervisor but have not yet been activated cannot be modified. Modifications to person / prospect person evidence on the person tab evidence do not require approval as this evidence is automatically activated when saved.

Case evidence operates differently to person / prospect person evidence on the person tab when modified. When a user updates an active evidence record, the modifications are not automatically applied. Instead, a new, in edit evidence record is created with the modifications. The purpose of this record is to allow users to work on the evidence updates without impacting case processing as the active evidence remains intact. When an in edit evidence record is updated, the modifications are automatically applied to the existing evidence record. The in edit function does not apply to person / prospect person evidence on the person tab. Active evidence records modified at the person tab level are automatically updated on modification.

Two types of evidence changes can be made to evidence: evidence corrections and changes in circumstance. When person / prospect person evidence on the person tab is corrected, the corrected evidence record will automatically supersede the existing active record. When a case evidence record is corrected, an in edit evidence record with the corrections will supersede the active evidence record as part of the apply evidence changes process. A change in circumstance does not replace existing active evidence as the original evidence was correct for a given period of time but the new circumstance applies to the next period of time. For case evidence, an in edit evidence record which includes the changes in circumstance is created and activated in its own right.

For changes in circumstances, the effective date of change indicates the date on which the change in circumstances is effective. For example, the income amount for an income evidence record might go from 100 to 90. The effective date is the date on which the income amount was reduced. This style of evidence represents an evidence record that has a continuous timeline. For example, an income evidence may capture the details of the employer and the weekly amount of income the client receives. While the client is employed by that employer, the income may vary over time. On week 1 the income may be 40, on week 2, the income may be 100, week 3, 0 and week 4, back to 40 again. While on one of the weeks the income is '0', the client was still employed. Using 'effective date of change' would record each change in succession over the four week period. If however the client was no longer employed by that employer, the income record would be ended. If at a later date the client was employed once again by the same employer, a new income record would be created. This allows the user to see the income received for each instance the customer was employed.

When making an evidence correction, the effective date of change should not be entered and on some evidence types, particularly where 'from' dates are used, this option may not be available. The corrected record automatically applies to the same period as the active evidence record. For example, if an incorrect date of birth is recorded for a person, the caseworker can update the persons birth and death evidence and correct the date of birth. Typically bank account, birth and death, email address, identification, phone

number, and relationships evidence types do not change over time. Therefore any modifications to these evidence types is a correction.

When a modified person / prospect person evidence record is saved all cases that use this modified evidence will the be reassessed.

Remove Active Evidence

The remove active evidence maintenance function is used to mark an active evidence record as pending removal. It is important to note that this function does not actually remove the active evidence record. If the active evidence record has already been marked as pending update then it cannot be marked as pending removal. Additionally, active evidence which is itself a parent of an active child evidence record cannot be marked as pending removal.

Pending removal evidence records are still used for assessment until evidence changes are applied and the evidence records are canceled. Canceling an evidence record can affect eligibility and entitlement. Separating the removal and cancellation functions prevents evidence records from being canceled in error.

Active person / prospect person evidence can be removed from the person tab. If a person / prospect person evidence record is selected for deletion, it is removed from the person tab evidence list. Removing active person / prospect person evidence in the person tab that is used as part of an integrated case, causes all product delivery cases in the integrated case that use this evidence, to be reassessed.

Discard In Edit Evidence

The discard in edit case evidence maintenance function simply discards an evidence record with an in edit status. Since in-edit evidence records are not used for assessment, the functionality to remove them is much simpler. Note, however, an evidence record that has been approved by a case supervisor but not yet activated cannot be discarded.

Validate Evidence Changes

The validate case evidence changes maintenance function allows a user to validate evidence changes for an evidence type. It is a pre-test of the apply evidence changes maintenance function for a specific evidence type.

As evidence changes can be applied across any number of evidence types at once, it can be difficult for a user to find and correct all errors that have occurred. Pre-testing allows a user to test the evidence changes for just one evidence type and correct these changes before actually apply them.

Apply Evidence Changes

The apply evidence changes maintenance function serves two purposes; one is to activate new and updated evidence, the other is to remove (cancel) active evidence which is pending removal.

A user can enact this function by applying all outstanding changes or by selecting specific changes to apply from the complete list of pending changes for a case.

When a user applies evidence changes, the following occurs:

- The system validates the evidence changes at both the case level and the evidence type level. This ensures that the business requirements defined by the evidence type are met as well as any additional business requirements at the case level. For example, validations applied at the case level can ensure that parent / child relationships are protected.
- The system checks if evidence approval is required. If so, the system notifies the case supervisor with instructions to approve or reject the evidence changes and the apply evidence changes process is put on hold until approved. If case supervisor approval is not required, the apply evidence changes process continues accordingly.
- The system activates in-edit evidence records and, where using Cúram rules, calculates the attribution periods for the newly activated evidence. The newly activated evidence is used for assessment purposes.
- For evidence corrections, the existing active evidence record is superseded.

- For changes in circumstance and where using Cúram Rules, the system re-attributes all evidence records within the set of successive changes to the same piece of active evidence.
- The system cancels active evidence which is pending removal. The canceled evidence will no longer be used for assessment purposes.
- The system assesses each case impacted by the evidence changes to determine if these changes have impacted case eligibility and entitlement.
- Where using Cúram rules, the system uses the attribution periods for a case to determine the assessment period. The earliest attribution period from date and the latest attribution period end date are set as the assessment period. For Cúram Express Rules, the assessment period is incorporated into the time line.

A hook point is provided which enables an agency to automate this functionality, allowing an agency to automatically apply evidence changes rather than a user having to do this manually. This means that when an active evidence record is updated and a new in-edit version of the active record is created, it is automatically activated so that it supersedes the existing active evidence record. In the case of an evidence removal, the evidence record is automatically canceled rather than being marked as pending removal.

Multiple Participant Evidence Update
The goal of the multiple participant evidence update is to make it easier for a caseworker to create, modify and/or discard evidence and apply the change to additional active case members.

When evidence is configured to support multiple participant updates, caseworkers have the ability to apply the update across all the active case participants in the household.

The Multiple Participant Evidence Update when enabled, changes the Dynamic Evidence create, modify, and discard pages to contain a list of participants or evidence. Dynamic Evidence is effective dated, as with all Dynamic Evidence updates, if the multiple participant evidence update is enabled, the change to the screens will only be available if the received date or effective date of the evidence is after the effective date of the Dynamic Evidence Type effective date. During intake, if the received date or the effective date is before the effective date of the Dynamic Evidence Type effective date, the screens revert to the screens that are valid for the input received date or effective date. This is standard Dynamic Evidence behavior.

Below is an overview of how the Multiple Participant Evidence Update affects each page.

The Create Page

When a user selects the **Add** action or the **Plus icon** from the evidence dashboard. The create page is presented to the user. If there are more than one active case participants on the case, the **Case Participant(s)** cluster displays a list of contains a list of case participants.

When selects the **Save** button, the evidence entered is applied to all the participants selected in the **Case Participant(s)** list.

If there is only one person on the case, the **Case Participant(s)** cluster contains a label with the selected participants name.

The Modify Page

When a user selects the **Contine Editing** or the **Edit** action from the evidence action menu. The modify page is presented to the user. If there are more than one active case participants on the case, an extra cluster is added to the modal with a title **Apply Evidence To Other Case Participants**. The **Apply Evidence To Other Case Participants** cluster contains a multi-select list.

1. A list of Active Evidence Records of the same Evidence Type as the selected Evidence record, for all active, non-end-dated case participants. If there is an In-Edit version of the record, the In-Edit version is displayed in the list.
2. The selected record is not displayed in the list.
3. Evidence that is associated with the selected case participant is not displayed on the list, this ensures no duplicate evidences are created.

When the caseworker selects the **Save** button, the modification entered is applied to the selected case participant and all additional case participants selected in the **Apply Evidence To Other Case Participants** list. Once the save is completed, all selected records are updated with the new information, this includes any comments that might already exist.

If there is only one person on the case, the **Apply Evidence To Other Case Participants** is not visible.

The Discard Page

When a user selects the **Discard** action from the evidence action menu. The discard page is presented to the user. If there are more than one active case participants on the case, an additional cluster is added to the modal with a title **Apply Discard To Other Case Participants**. The **Apply Discard To Other Case Participants** cluster contains a multi-select list. The contents of the list is as follows;

1. A list of In-Edit records of the same Evidence Type as the selected Evidence record, for all active, non-end-dated case participants.
2. The selected record is not displayed in the list.
3. Additional In-Edit evidences of the same type for the selected participant is not displayed on the list.

When selects the **Yes** button, the evidence is discarded for selected case participant and all additional case participants selected in the **Apply Discard To Other Case Participants** list.

If there is only one person on the case, the **Apply Discard To Other Case Participants** is not visible.

Before applying the multiple participant evidence update to a new evidence type, the guidelines provided below must be adhered to.

Multiple Participant Evidence Update Guidelines
Guidelines on when the Multiple participant Evidence can be applied.

Not all Dynamic Evidence Entities are suitable for Multiple Participant Evidence. This document provides guidance to developers and Business Users of Cúram on when the multi-participant evidence update can be applied to a Dynamic Evidence.

1. The multi-participant evidence update can only be applied when **all** the attributes of an evidence can be applied to other case participants at the same time. Where one or more attributes on an evidence cannot be applied to other participants, the evidence type is not suitable for multiple participant evidence update.

   An example of this within Cúram is PDCAddress and PhoneNumber, which have been configured for multi-participant evidence updates. A household can move address on the same date, or start using a contact number on the same date.

   Is there any flexibility in that statement above, could a developer apply the multiple participant evidence update on evidence where most of the attributes would apply?

   There is limited flexibility here, if the evidence is categorical or classification evidence that is not used by the rules to determine eligibility then the feature could be applied. However, if all the information that is captured by a caseworker is used by rules, the caseworker would have to change the incorrect evidence attribute once it is been created. Therefore, there is no real usability gain for the user.

2. The multiple participant evidence is not supported on parent-child Evidence types.
3. The Evidence must have a Create/Modify and Discard page that applies to all participants.

   The multiple participant evidence update, once enabled is applied across the create, modify, and discard pages.

4. If the Evidence create page selects a participant from the predefined set of case participants, the feature is suitable. However, if instead the create page allows for the selection of an existing participant on the case or registration of a new case participant, the feature is not suitable and cannot be used.

   The setting to enable the different participant selection options is managed in the Dynamic Evidence Editor by the 'Show All Fields' check box. The ability to apply multiple evidence updates across

participants and 'Show All Fields' is mutually exclusive. The reason is, the multi-select list does not get updated if a new participant is added to the case on the create page. In order to enable the multiple participant evidence update, the 'Show All Fields' check box must be disabled in the Dynamic Evidence Editor.

5. The Business of the Evidence applies to one person only.

   If there is evidence that is centered around one participant, there is no business reason for the evidence to be applied across multiple participants.

6. Static Evidence has not been updated to include the multi-participant feature. If customers have a requirement for multi-participant updates on static evidence, they must implement this themselves.

7. When enabled, the multi-participant evidence update performs multiple evidence inserts, updates, or discards within a single transaction. The performance of this transaction will therefore be impacted with increasing number of records selected and users should be advised, in scenarios involving large household sizes, they may need to consider splitting the data-entry and not attempt to achieve in one go. When evaluating this feature, the following factors must be considered to determine if these negatively impact the performance leaving it unsuitable to adapt the feature for the evidence type in question;

   a. Validations performed on the evidence type especially where validations evaluated over an extended time frame.

   b. Verifications conditions especially if there are many conditions in a verification ruleset.

   c. Pre and\or post insert processing.

(deprecated) Using the EvidenceFlow View

The EvidenceFlow view is a tool that allows caseworkers to quickly navigate through evidence and see any missing or required information; as such it provides a useful view when talking to the client. Evidence types are grouped in "stacks." A stack is displayed automatically for each evidence category configured by the organization in the form of an accordion within the EvidenceFlow view.

The organization can configure the order in which the evidence types are displayed within a category, for example, alphabetically, or by most-commonly entered evidence types. The caseworker navigates through the stacks by clicking on the relevant accordion bar.

Additional issues and verifications stacks are available for evidence types that have issues, and evidence types that have outstanding verifications. For more information see "System Generated Stacks" on page 14.

Within each stack, evidence types are displayed in a list as tiles and summary information is displayed for each tile that is in-focus. The caseworker can select a tile by clicking it in the sequence or can scroll through the tiles using controls beneath the EvidenceFlow view.

The system dynamically updates the panel of the EvidenceFlow view with the evidence type list for each evidence type in focus. Caseworkers can maintain evidence for the evidence type in the standard fashion from this list.

The system dynamically updates the panel after a configurable amount of time has passed with the current tile in focus. For more information on the setting that allows administrators to configure this amount of time and on other available EvidenceFlow configuration options, see the `Cúram Integrated Case Management Configuration Guide`.

Evidence issues and reminders are displayed to the user navigating through the EvidenceFlow view. The issues and reminders that are displayed to the user are configured using the Cúram Advisor.

For more information on configuring the Cúram Advisor, see the `Cúram Advisor Configuration Guide`.

Issues highlight missing information that is required before eligibility can be determined. For example, if an earned income record is missing the income amount, an issue is displayed to the caseworker as this is a required field.

Reminders prompt the user to ask additional related questions based on evidence captured. For example, if the caseworker captured a property resource record, the system reminds the caseworker to also ask the client about resource income. The EvidenceFlow view displays the number of issues, reminders and outstanding verifications associated with an evidence type in the EvidenceFlow view. The user can review details of the issues and outstanding verifications from the lists displayed along with the evidence type list. The user can review details of the reminders in the Smart Panel.

System Generated Stacks

The system automatically displays the following system generated stacks: a stack for each evidence category configured, an issues stack and a verifications stack. For more information on configuring evidence categories, see "Setting up Dynamic Evidence Types" on page 16. System-generated stacks cannot be modified or deleted by the user. The evidence types within stacks are automatically updated. For example, if the evidence issues associated with a particular evidence type are resolved, the system automatically updates the issues stack and the evidence type is no longer displayed within that stack.

The issues stack includes any evidence types that have issues associated with them. The issues stack enables users to quickly view all evidence types that have issues which must be resolved.

The verifications stack includes any evidence types that have outstanding verifications associated with them. The verifications stack enables users to quickly view all of the evidence types which require verification.

(deprecated) User Defined Stacks

The view supports the creation of user defined stacks. A user can create new stacks and manually add evidence types to the stacks. For example, a user may wish to create a Household Member stack, and include all evidence types relating to the Household Member evidence so he or she can focus on those evidence types together.

A new stack is created by using the New Stack accordion bar in the **EvidenceFlow** view. A name is recorded for the stack, and evidence types are added by dragging and dropping tiles onto the stack accordion bar.

Evidence types can be added and removed from a user-defined stack. Additionally a user-defined stack can be renamed, or removed. User-defined stacks are persisted per user for the application they were created on. for example, if a caseworker closes the **EvidenceFlow** view, then reopens it, the user-defined stacks are still available. Note that when a new stack is defined, only the caseworker who created the new stack can access it. No other users can access stacks created by another caseworker.

Additional Features

Evidence Relationships

Evidence types can naturally relate to each other. The most common evidence relationship is the parent/child relationship where a parent evidence record can have one or more related child evidence records. For example, an income evidence record can have one or more income usage evidence records.

Evidence relationships impact evidence maintenance in a number of ways. The evidence type list for child evidence types is filtered to display only those evidence records that are related to the parent evidence record. Also, validations can be called which check for any evidence relationship requirements. For example, it may not be possible to remove a parent evidence record if there are any active child evidence records related to it.

Evidence types can have multiple evidence relationships. For example, an evidence type can be the parent of one evidence type and the child of another; this is referred to as a parent/child/grandchild relationship. Also, evidence relationships can be optional. For example, the housing expense evidence type could be in an optional parent/child relationship with the loan evidence type. From a business perspective, certain loans may be directly related to a housing expense, while other loans may be unrelated to housing expenses, such as a car loan.

Evidence Approvals

Evidence approval checks provide an extra step in the apply evidence change process to ensure that case evidence changes are correct. When a user selects to activate evidence or remove evidence, the system determines whether or not the evidence change requires approval from the case supervisor. If approval is required, the case supervisor is notified that the evidence cannot be activated or removed until the case supervisor approves the evidence change. The case supervisor can choose whether to approve or reject the evidence changes. If the case supervisor chooses to approve evidence changes, the case supervisor is brought directly to the approve evidence change conformation page. If the person submitting the evidence is the same as the user to whom the evidence approval task will be assigned the evidence is automatically activated.

The evidence framework provides support for configuring evidence approval checks for an evidence type. A percentage is entered for an evidence approval check which denotes the percentage of evidence changes which will require manual case supervisor approval. For example, 80 percent of evidence changes for the income evidence type can require approval. This means that 80 percent of all income evidence records must be manually approved before they are activated or before they are removed. If no evidence approvals are configured, the system interprets this to mean that evidence approvals are not required.

The evidence framework provides a list of all evidence records on a case that have been submitted for approval. The status of each evidence record is shown to provide a history of which evidence records have been rejected and which have been approved

Evidence approval checks do not apply to evidence maintained in the person tab. This is because the evidence does not have in edit state and therefore there is no ability to approve or reject the evidence before it is applied. Therefore in order to enable approvals for these evidence types, the evidence should also be configured on the integrated case.

Note: Evidence approval checks can also apply to different levels of the organization structure, including users, positions, and organization units. This is covered in more detail in the Cúram `Organization Administration Guide`.

Evidence Change History

A comprehensive change history is maintained for person / prospect person and case evidence. This history is started when a new evidence record is inserted and is added to whenever a change such as a modification or cancellation occurs. Each entry in the change history contains the type of change, the date and time that the change was made, and the user who performed the change. The change history is useful for determining the reason why a person / prospect person's eligibility may have changed and for audit purposes.

Snapshot of Evidence for Issue Cases

The snap shot evidence feature provides the ability to create a copy of a case evidence record. A snap shot of evidence is used if an inquiry into evidence is required. A snap shot of the evidence record is recorded at the time a discrepancy is raised and is used in the issue case to manage the investigation of any evidence discrepancies. For more information, please see the Cúram `Issue Management Guide`.

Transfer Evidence

Transferring evidence allows case evidence to be copied from one case to another. The transfer evidence maintenance function allows a user to select a case participant and from a list of the evidence associated with the participant, choose which evidence is to be transferred. The user then selects which evidence from the list is to be transferred for use on a different case. The user can choose to include all evidence related to a participant or a specific evidence record. Evidence can be transferred between cases of different types, however, for this to happen, the case to which the evidence is being transferred must be configured to receive evidence of the type being transferred.

Configuration Evidence

A description of the steps to follow in the application administration to capture and maintain evidence at both the person tab and case level.

Overview

These steps include configuring evidence types, and then associating the evidence types with application cases, persons and prospect persons, cases, and categories. The evidence framework supports the configuration of both dynamic and non-dynamic evidence. The latter traditionally involved development time activity, so is outside the scope of this information.

Note: The following information describes the configuration when using dynamic evidence to create new dynamic evidence types.

Setting up Dynamic Evidence Types

Administrators can configure dynamic evidence types using the administration application and the Dynamic Evidence Editor. A dynamic evidence type represents a logical grouping of related attributes about which the organization wants to record information in respect of a person / prospect person or a case.

Administration pages for dynamic evidence are located in the Rules and Evidence areas of application administration. Dynamic evidence supports dynamic evidence types and dynamic evidence type versions. Dynamic evidence types are associated with participants and/or case types to indicate that the evidence is applicable and maintainable for a particular person / prospect person and/or case.

Evidence type versions support modifications to metadata over time. For example, a change in legislation may require a new evidence attribute to be recorded on an evidence type, starting from a specified date. Dynamic evidence supports this requirement by using evidence type versions to record the modifications.

Note: The dynamic evidence types provided for person/prospect persons in the person tab are required for specific system processing and therefore the existing attributes should not removed or modified. Doing so could impact system functions which rely on this information. For more information on how this evidence is used, see the `Curam Participant Guide`.

For more information on dynamic evidence configuration, see the `Curam Dynamic Evidence Configuration Guide`.

Associating Evidence Types

Once the dynamic evidence types have been created using the Dynamic Evidence Editor, the evidence types can be associated with the relevant person / prospect person and case types. These associations determine where the evidence can be captured and maintained. For example, if the organization wants to have the ability to capture specific information on the integrated case, they must configure these evidence types to be available on the integrated case.

Whether an evidence type is linked to a product or integrated case determines how it will be used in eligibility and entitlement determinations. For example, an evidence type configured on an integrated case can be used by any product deliveries associated with that integrated case. An evidence type associated to a product delivery may only be used in a determination relating to that specific product delivery. Person / prospect person evidence types can be associated with person and prospect person participant types and any case type if required.

Evidence types can be logically grouped into evidence categories. Examples of evidence categories are expenses evidence and household evidence. Grouping evidence types by category provides an easy way for caseworkers to view and create evidence. Evidence types can also be marked as preferred, indicating that they are commonly-used which provides caseworkers with a quick method to create evidence records for frequently recorded evidence types.

As part of associating evidence, each evidence type must be enabled to share its evidence.

Deciding where to configure the evidence types is an important business decision for the organization. This decision should be made with all citizens in mind and with consideration to how the organization currently operates. For some organizations the integrated case is the central location for products/ services to clients. It facilitates capturing information about more than one person, for example, household information can be maintained on an integrated case. Therefore, providing caseworkers with the ability to maintain all the information about a person in one place is practical for the caseworker. They can capture personal or case specific information on the integrated case.

Setting up Evidence Verifications

The administration component of Cúram Verifications allows administrators to define the verification rules that are associated with case and person / prospect person evidence.

A verification category is a means of arranging evidence data into logical groups by grouping elements called verifiable data items, for example, Personal. The verifiable data item can be defined as a piece of evidence that requires verification. This piece of evidence corresponds to a single attribute within a specific evidence entity, e.g., date of birth on the birth and death evidence type. Verification item utilizations define which verification items (e.g. passport, birth cert) are to be used for a particular verifiable data item. A verification item defines what can be used to verify the information provided by a participant, for example a passport, birth certificate. A verification requirement provides the rules of verification for a piece of data. For example, whether the verification engine needs to apply the rules to participant level data or to a specific product delivery case or to a specific integrated case.

A recommended configuration when creating verifications at the person level, is that they should 'Apply to' a product delivery, integrated case or application case. This would mean that the verification would be created where it applies ie. on the selected case. It also means that the user cannot activate the evidence on the case it applies to until the mandatory verification is satisfied. Verifications can be configured for sharing using the evidence broker configuration, if required. Therefore using this feature verifications captured on evidence on one case can be shared with that evidence to another case.

For detailed information on configuring Verifications, see the `Cúram Verifications Guide`.

(deprecated) Setting up Evidence Sharing

Note: This section applies only to evidence sharing with the evidence broker version 7.0.1.x and earlier, which corresponds to the value of the curam.aes.advancedEvidenceSharingEnabled property being set to NO. See the Evidence broker section for information about how sharing occurs when the curam.aes.advancedEvidenceSharingEnabled property is set to YES.

The configuration options for sharing evidence are available in the administration application using the evidence broker. Evidence sharing can be configured between a person/ prospect person, application case and integrated cases.

In order to share evidence the caseworker must enable each evidence type for sharing, as the evidence broker will only share evidence changes for evidence types that have been enabled for sharing. Where evidence types have been enabled for brokering, the next step is to define the source (where the evidence needs to be shared from) and target (where the evidence needs to be shared to).

The following items should be considered when configuring evidence broker:

• Is the same evidence type used on more than one case type?

• If an evidence type is used in more than one place, should changes to this data be communicated to other cases?

• Should the target case be set up to automatically accept any changes or should the case worker be forced to decide on whether to accept this incoming evidence?

Note: In order for system processing to work correctly, it is essential the person and prospect person evidence configured outside of the person tab, are configured to share any changes back to the person tab.

For example, an organization may have a Child Welfare case that maintains identification evidence for a person and an Income Assistance case which also maintains identification evidence for the same person.

If sharing is not configured between those two case types, it is important to share evidence back to the individuals person tab, because it ensures all the person / prospect person evidence can be viewed centrally.

There are three processes for configuring evidence sharing between case types: identical evidence, non-identical evidence and non-identical evidence mapping. For all three processes, it is necessary to select a source and target. The evidence broker will broadcast shared evidence from the source to the target.

The recommended evidence broker configuration for organizations using Universal Access are as follows:

Sharing from source Person/Prospect Person to a target Application Case:

- An existing registered person, applies for a program online. The caseworker managing this application case may want to know the existing information for the person and have the opportunity to update the information received on the application case for that person. Note: When brokering evidence from a person/prospect person the automatic accept and automatic activate options should not be set. This is important because the evidence being shared from the person/prospect person may be out of date (e.g. they may have been registered some time back and any benefits/cases since closed). If these are not set, it ensures that the worker processing the application case gets an opportunity to see those details as part of incoming evidence. At that point, they can decide whether or not the evidence on the application case needs to be updated based on some information we already have about the client, accept any additional evidence not already captured on the application case or ignore the evidence from their person/prospect person record because the evidence received on the application case is more up to date.

Sharing from source Application Case to a target Person/Prospect Person:

- Once the application is complete, programs are authorized. New information may have been received about the person on the application that should be shared to their person record.

Sharing from source Application Case to a target Ongoing Case (Integrated Case or Product Delivery):

- When an application case is authorized, the evidence broker is the mechanism used to copy this evidence from the application case. Therefore configuration from the application to the ongoing case should also include automatic acceptance as well as automatic activation to facilitate a straight through process. This configuration ensures that a caseworker does not have to review and apply changes to evidence again on the integrated case thus facilitating straight through processing.

Sharing from source Ongoing Case to a target Application Case:

- A person has an existing ongoing Case and makes a new application for benefits. The intake worker managing the application would be interested to receive the existing information on the system for the applicant, as it may impact their new application.

Sharing from source Ongoing Case to a target Person / Prospect Person:

- It is important that the person record holds all the person evidence changes, and is up to date. Therefore sharing should be enabled from the ongoing case. This ensures that any updates to evidence is shared to the person record where system processing relies on that data.

Sharing from source Person to a target Ongoing Case:

- Any evidence captured about a person should be shared to the ongoing case to ensure that the information that may affect eligibility and entitlement is up to date. At a minimum, it provides the owner of the ongoing case with the information about a case member that was updated elsewhere. If configured to do so, they then have the opportunity to either accept or reject the change.

In order to understand how the recommended configuration would work, see appendix A. For detailed information on configuring the Evidence Broker, see the `Cúram Evidence Broker Guide`.

Display Deleted Evidence

The configuration option for displaying deleted evidence is available in the administration application using the application properties. By default, deleted evidence is not displayed. If a client wishes to have a view of deleted evidence they can select the application property to Display Deleted Evidence. If this

configuration option is selected, any deleted evidence will be displayed in the Evidence Type list or the Evidence Object Type tab.

Configuring an Evidence Dashboard Group

The administrator user can create an evidence dashboard group to which evidence types can be added. Once configured, the evidence dashboard group is presented to a caseworker on the Evidence Dashboard and on selection, will filter the evidence so that it displays only the evidence types that are part of that particular group. Evidence dashboard groups can be created to help users perform a specific task in regards to evidence maintenance. For example, an evidence dashboard group can be created for the task of adding a member to an Integrated Case. All evidence needed to complete this task can be grouped together so that when the group is selected on the dashboard at the case level, only the evidence belonging to the group will be displayed on the dashboard.

The administrator can also set evidence types to be required for that specific group. Evidence types which are flagged as required are used to prompt the user that the evidence type should be entered as part of the task this evidence group relates to.

Evidence dashboard groups can be configured on application cases, integrated cases and product delivery case types. This can be done from the case configuration area of admin for each of the case types mentioned. Evidence dashboard groups are specific to the case type in which they are configured against.

Enabling the End Dating of Previous Evidence When Creating Evidence

An administrator can configure evidence types to allow the caseworker to end date existing evidence when creating evidence, depending on requirements. By configuring evidence to combine the creation and end dating of evidence, ending an evidence record is no longer a two-step process that requires unnecessary clicks and extra navigation. If the end dating feature is enabled for an evidence type, an end dating option is displayed in the evidence creation wizard for that evidence type.

Before you begin

For information about the eligibility criteria that apply to the evidence end dating feature, see the *New Evidence* related link.

About this task

The following list outlines the scenarios in which an administrator can apply the end dating feature to evidence:

Dynamic evidence
For dynamic evidence, configure the evidence end dating feature on the **New Dynamic Evidence Type** page and on the **Edit Dynamic Evidence** page.

Non-dynamic evidence
For non-dynamic evidence, configure the evidence end dating feature on the **New Evidence Metadata** page and on the **Edit Evidence Metadata** page. Similar to other non-dynamic evidence pages, you must generate the appropriate wizard page by using the evidence generator, and then enable the wizard page by editing the asset server XML metadata file. For more information, see the related links.

Custom evidence
For information about configuring the evidence end dating feature for new dynamic evidence types, see the related link to *Creating a Dynamic Evidence Type*.

For information about the technical implementation and behavior of the evidence wizard in relation to the end dating of evidence, see the related link to *Evidence End Dating Implementation*.

The following procedure describes how to configure the end dating feature for dynamic evidence, and for non-dynamic evidence.

Procedure

1. Log on to IBM Cúram Social Program Management as an administrative user.

2. Click **Administration Workspace**.

3. In the Shortcuts panel, click **Rules and Evidence**.

4. Depending on the evidence type that you want to configure the end dating feature for, click either **Dynamic Evidence** or **Non-Dynamic Evidence**.

5. For each evidence type, click **Edit** in the list actions menu.

6. Select **Enable End Dating when Creating Evidence**.

7. For non-dynamic evidence, when you select **Enable End Dating when Creating Evidence**, enter the page name for the wizard in **End Dating when Creating Evidence Wizard Page Name**.

8. Click **Save** to complete the changes.

Related concepts

New Evidence
A caseworker can use the new evidence function to capture evidence information for an evidence type.

Developing with the Evidence Generator

Asset Server XML

Creating a Dynamic Evidence Type

Related tasks

(deprecated) Applying End Dating in the Creation of New Evidence Records
When caseworkers create evidence records, they can end date previous evidence records of the same type during the creation process, if an administrator has enabled the end dating feature for the evidence type. Caseworkers create an evidence record by recording the evidence in the first page of the evidence wizard. Then, if the end dating feature is enabled, a second page is displayed in the wizard where caseworkers can end date previous evidence records.

Related reference

Evidence End Dating Feature Implementation

(deprecated) End-to-End Evidence Scenarios

An overview of evidence business scenarios. Based on the recommended configuration settings, the scenarios illustrate the full end-to-end flow of evidence from application through to ongoing case.

Note: This section applies only to evidence sharing with the evidence broker version 7.0.1.x and earlier, which corresponds to the value of the curam.aes.advancedEvidenceSharingEnabled property being set to NO. See the Evidence broker section for information about how sharing occurs when the curam.aes.advancedEvidenceSharingEnabled property is set to YES.

For more detailed information on Universal Access, see the `Curam Universal Access Guide` and for information on intake, see the `Curam Intake Guide` .

(deprecated) Introduction

Note: This section applies only to evidence sharing with the evidence broker version 7.0.1.x and earlier, which corresponds to the value of the curam.aes.advancedEvidenceSharingEnabled property being set to NO. See the Evidence broker section for information about how sharing occurs when the curam.aes.advancedEvidenceSharingEnabled property is set to YES.

The Cúram evidence overview provides an overview of evidence business scenarios. Based on the recommended configuration settings that are outlined in Chapter 4, these scenarios illustrate the flow of evidence through the application. These scenarios describe the full end-to-end flow from application to ongoing case.

For detailed information on Universal Access, see *Cúram Universal Access* and for information on intake, see the *Cúram Intake overview*.

(deprecated) Citizen Applies for Benefits

Note: This section applies only to evidence sharing with the evidence broker version 7.0.1.x and earlier, which corresponds to the value of the curam.aes.advancedEvidenceSharingEnabled property being set to NO. See the Evidence broker section for information about how sharing occurs when the curam.aes.advancedEvidenceSharingEnabled property is set to YES.

A citizen Mary applies for a benefit online. She has never been in receipt of benefits in the past and she is not recorded on the system.

1. Mary completes an online application for benefits and enters the following information:

   - Name
   - Date of Birth
   - Gender
   - Phone Number
   - Email Address
   - Address
   - Income
   - Expenses
   - Employment

2. Mary submits the application to the agency where it is determined that she is not registered on the system, using the search and match process, so she is automatically registered as a new person.

3. Mary is registered as a person. The registration process captures name, date of birth, and gender which is the mandatory registration information required. The system creates the following person evidence records – name, birth and death and gender.

4. An application case for benefits is then created for Mary and all of the evidence that she supplied on her online application is added to the application case. An application case is created automatically when the application is submitted, all the evidence captured on her application is mapped to the new application case, as configured using the Cúram Data Mapping Engine.

5. Later that day, Mary arrives for an interview with Paul the intake worker and realizes that the date of birth she supplied on her application was typed incorrectly. Paul selects the birth and death evidence on the application case and edits the date of birth to the correct date and saves the details.

6. Paul reviews the rest of the application case evidence and as everything is complete and in order, authorizes the program Mary applied for on the application. When the application is authorized, this triggers the evidence broker to share the application evidence based on its configurations. Note: Only the evidence that is required for the ongoing cases, for the programs being authorized, is activated and brokered at this point.

7. Once the application is authorized, an integrated case is created automatically for Mary and a product delivery case is also automatically created for the program for which Mary has been approved. The evidence broker processing is triggered by the authorization of the application case. The brokering configuration determines what evidence needs to be shared and where it needs to be shared. In this case, the configuration is such that the sharing must occur between the integrated case and Mary's person record. All evidence types captured for Mary, are to be shared to the integrated case but only the following are configured for sharing to Mary's person record:

   - Name
   - Birth and Death
   - Gender
   - Phone Number
   - Email Address
   - Address

This is because these details are more generic and typically apply to any case Mary is part of whereas the additional evidence types such as income, expenses and employment may only be appropriate for certain types of cases.

8. The evidence broker shares the following evidence from the application case to the integrated case:

   - Name

   - Birth and Death

   - Gender

   - Phone Number

   - Email Address

   - Address

   - Income

   - Expenses

   - Employment

9. The evidence broker then shares the following evidence from the application case to Mary's person record:

   - Name

   - Birth and Death

   - Gender

   - Phone Number

   - Email Address

   - Address

10. The integrated case is set to auto accept and auto activate the evidence so the evidence shared from the application case to the integrated case is now active.

11. The evidence that is brokered to Mary's person tab is automatically managed as follows:

    - The phone number, email address and address evidence are added to Mary's person tab.

    - As name, gender and birth and death evidence already exist on Mary's person tab, the system processes as follows:

      – For each evidence record, the system performs a check to determine if the incoming evidence matches with any already held.

      – As the gender and name evidence already held on Mary's person tab, contains the same data as the incoming records, the system treat these as identical and makes no attempt to update the records already held.

      – The birth and death information record shared from the application case does not match what is held (as this was changed on the application case when Mary came in for her application interview). In order to determine if the existing record should be updated, the system compares the date both evidences were received. In this case, as the application case update to the birth and death evidence is more recent, the system updates the birth and death evidence record. Note that any user viewing this evidence record will be able to see the update history.

    .

(deprecated) Registered Person Applies for Benefits

Note: This section applies only to evidence sharing with the evidence broker version 7.0.1.x and earlier, which corresponds to the value of the curam.aes.advancedEvidenceSharingEnabled property being set to NO. See the Evidence broker section for information about how sharing occurs when the curam.aes.advancedEvidenceSharingEnabled property is set to YES.

John applies for a benefit online. He has been in receipt of benefits in the past and is recorded on the system.

1. John completes an online application for benefits and enters the following information: name, date of birth, gender, phone number, email address, address, income, expenses and employment.

2. John submits the application to the agency where it is determined that he is already registered on the system, using the search and match process. He is matched to a registered person on the system using name, date of birth and gender.

3. An application case for the benefit is then created for John and all of the information that he supplied on his online application is added to the application case as evidence. Note an application case is created automatically when the application is submitted, all the evidence captured on her application is mapped to the new application case, as configured using the Cúram Data Mapping Engine.

4. The evidence broker then shares John's evidence from the person tab to the application case, where it appears as incoming evidence. In this instance, all the evidence on the person tab is the same as the evidence on the application case, with the exception of the phone number evidence.

5. A new mobile phone number has been recorded on the application case. Paul reviews the incoming evidence from the person tab, chooses to ignore the old phone number evidence as he knows the number he has is correct. Paul uses the system to compare the incoming evidence and existing evidence to help decide whether to accept this incoming evidence or not.

6. Paul reviews the application case evidence and authorizes the application case. When the application is authorized, this triggers the evidence broker to share the application evidence based on its configurations.

7. An integrated case is created automatically for John along with a product delivery case for the benefit.

8. The evidence broker shares the evidence from the application case to the integrated case.

9. The evidence broker then shares John's application evidence to the person tab. Note that as the evidence had already been brokered from the person to the application case, the system will not broker this again. Only the new phone number record is shared to the person tab.

(deprecated) Adding a Relationship and Related Person to an Integrated Case

Note: This section applies only to evidence sharing with the evidence broker version 7.0.1.x and earlier, which corresponds to the value of the curam.aes.advancedEvidenceSharingEnabled property being set to NO. See the Evidence broker section for information about how sharing occurs when the curam.aes.advancedEvidenceSharingEnabled property is set to YES.

Mary is a registered person with an integrated case. Mary contacts the agency to inform them that her son John is back in her care.

1. Mary contacts the caseworker Paul who manages her ongoing case. She advises Paul that her son John has come back into her care having previously been living with her estranged husband.

2. Paul accesses Mary's case evidence and sees that there is no relationship information recorded between Mary and any other person. Paul creates a new relationship evidence record relating Mary to her child John. Note that Paul searched for John and found he was already registered as a person in the system.

3. Paul decides to apply the new relationship record to Mary's case (note that at this point, there is no reciprocal relationship from John to Mary seen on the case as John is not a member of the case). Once the evidence is applied, the Evidence Broker is triggered.

4. The evidence broker broadcasts the new relationship evidence to any case or person / prospect person record configured for sharing and and that is also configured for sharing relationship evidence. Therefore, the new relationship record is shared to Mary's participant record.

5. When the relationship between Mary and John is received in the person tab, the system first determines if a relationship record already exists. As there is no relationship recorded already between Mary and John, the new relationship evidence is recorded.

6. When this relationship is added, the system then creates a reciprocal relationship evidence record for John which would is displayed on his person tab.

7. Having applied the relationship evidence on the integrated case, Paul decides that John should be included as a case member on Mary's case. He selects to add the child John as a member of Mary's integrated case.

8. When John is added to the integrated case, the evidence broker is triggered to retrieve any evidence held for John from his person record. The evidence recorded for John on his person record is shared to the integrated case.

9. Caseworker Paul sees a number of incoming evidence records for John including his name, birth and death, gender and relationship to Mary.

10. Paul accepts all this evidence on to the integrated case where it can be maintained as part of managing the ongoing integrated case.

(deprecated) Mapping Non-Identical SSN Evidence to Identification Evidence

Note: This section applies only to evidence sharing with the evidence broker version 7.0.1.x and earlier, which corresponds to the value of the curam.aes.advancedEvidenceSharingEnabled property being set to NO. See the Evidence broker section for information about how sharing occurs when the curam.aes.advancedEvidenceSharingEnabled property is set to YES.

A citizen Fred is applying for a benefit online and he has never been in receipt of benefits in the past and he is not recorded on the system. The system has been configured for non-identical evidence attribute mapping between the Identifications evidence (which is configured against person / prospect person) and SSN Details evidence which is configured against an integrated case. The attributes on each are as follows:

Table 1: Non-Identical Mapping of Identifications Evidence to SSN Details Evidence	
Identifications Evidence	**SSN Details Evidence**
participant	participant
alternateID	alternateID
altIDType	altIDType
	ssnStatus
	noSSNReasonCode
fromDate	fromDate
toDate	toDate
	noSSNReasonOtherDetails
preferredInd	
comments	comments

The system recognizes that the evidence attributes participant, alternateID, altIDType, fromDate, toDate, and comments common identical attributes so therefore creates attribute mapping configurations between them.

The evidence attribute ID Type is of data type code table. The code table used for both attributes is the same, therefore the system automatically creates code table mapping configurations between the code table values on SSN Details Evidence and the corresponding values on Identification Evidence. The administrator has configured the code table mapping configurations to be as follows:

Table 2: Non-Identical Code Table Mapping of SSN Evidence to SSN Details Evidence	
Identifications Evidence	**SSN Details Evidence**
Social Security Number	Social Security Number

This configuration will mean that when a value of Social Security Number is entered on Identifications Evidence or SSN Details Evidence it will be shared as identical when brokering is invoked between these two evidence types.

By configuring the non-identical evidence attribute mapping between these two dynamic evidence types, the evidence broker will share the attributes that match as if it were identical evidence. While the evidence are deemed non identical because they are different types, the attributes mapped between each type allow for any sharing to be treated in the same way as identical evidence. The following steps illustrate how this configuration would be applied in this scenario:

1. Fred completes an online application for benefits and enters the required information along with the following SSN identification details:

   SSN Identification Reference: 123-45-6789

   Type: SSN

   Comments: A brief note.

   Fred did not record any details for SSN Status, No SSN Reason, No SSN Other Details.

2. Fred submits the application to the agency where it is determined,using the search and match process, that he is not registered on the system.

3. Fred is registered as a person. The registration process inserts name, date of birth, and gender which is the mandatory registration information required. The system creates the person evidence records – name, birth and death and gender.

4. An application case for benefits is then created for Fred and all of the evidence that he supplied on his online application is added to the application case. Note an application case is created automatically when the application is submitted, all the evidence captured on his application is mapped to the new application case, using the Cúram Data Mapping Engine.

5. Paul, the intake worker, reviews the application case evidence and authorizes the application case. When the application is authorized, this triggers the evidence broker to share the application evidence based on its configurations.

6. Once the application is authorized, an integrated case is automatically created for Fred and adds the program for which Fred has been approved.

7. The evidence broker shares the evidence from the application case to the integrated case. The SSN details evidence on the application case maps directly to the SSN details evidence on the integrated case.

8. The evidence broker then shares Fred's application evidence to his person tab. The SSN details from the application case are non-identical and must be mapped to the identification evidence stored in the person tab. Once it is brokered the SSN Details evidence arrives on the Person evidence list as Identifications evidence. It is shared as identical evidence because it has been configured to do so when a code table value of type Social Security Number is captured.

9. Later the same day, Fred provides details of his passport that was required to verify his date of birth on the integrated case. The receptionist Jan also decides to capture this information in Fred's identification evidence. She therefore performs a person search and finds Fred's person record. She opens the person record and then proceeds to creating new identification evidence. Jan selects the type is Passport and the Identification reference is PO111111.

10. Jan saves the identification record. The evidence broker is triggered and the identification evidence is shared to the integrated case.

11. Caseworker for the integrated case, Sam, notices there is new incoming evidence received. He views the incoming evidence and notices that a passport/ID has been captured for Fred. The record is displayed on the non-identical tab on the incoming evidence sections no code table mapping configuration has been configured for the passport identification type. Sam decides to reject this evidence because he does not require it for the case. Note that if Sam had accepted the evidence, a new SSN identification evidence record would be displayed as in edit. However, upon activating that evidence, the system may have invoked a validation to say that the type must only be SSN (if no validation on type then this would have been applied to the case).

Alternatively if the system administration property `curam.evidence.brokeringUnmappedCodetableValues` was configured to 'NO' then this evidence record would not have been shared by the system at all.

(deprecated) Mandatory Verifications Applied to Integrated Case and Shared

Note: This section applies only to evidence sharing with the evidence broker version 7.0.1.x and earlier, which corresponds to the value of the curam.aes.advancedEvidenceSharingEnabled property being set to NO. See the Evidence broker section for information about how sharing occurs when the curam.aes.advancedEvidenceSharingEnabled property is set to YES.

Lisa is a registered person with two integrated cases. There is a mandatory income verification requirement on both integrated cases. Case A requires verification using a pay slip, Case B requires verification using both an employer letter and a pay slip. Lisa provides new income evidence to Paul the intake worker

1. Lisa has a meeting with Paul and provides him with information about new income.
2. Paul adds this income evidence to Case A. When this income evidence is added, a mandatory outstanding verification is created on Case A, stating that verification by pay slip is required. Lisa provides her pay slip to Paul.
3. Paul adds the pay slip verification document to Case A, which satisfies the verification requirement and he activates this income evidence.
4. The evidence broker then shares this new income evidence and its associated verification document to Case B. This assumes that brokering has been configured between these two integrated case types for the income evidence type and also to share the verifications with this evidence.
5. The income evidence appears as incoming evidence on Case B. Paul accepts this incoming evidence which includes the pay slip document. The verification processing results in the following:

   - The pay slip verification item is a requirement to satisfy income evidence on case B and as this has been shared from Case A and accepted on Case B, that requirement is satisfied.

   - The employer letter verification item is a requirement to satisfy income evidence on Case B also. As this was not required on Case A, it was not captured at that point. Therefore, Case B will have an outstanding verification required to satisfy full verification of the income evidence. Before the evidence can be activated, Lisa must provide a letter from her employer

6. Lisa returns to the agency the next day with a letter from her employer. Paul adds this verification document to the income evidence on Case B. Both verification requirements are now satisfied and the evidence can be activated.

(deprecated) Applying End Dating in the Creation of New Evidence Records

When caseworkers create evidence records, they can end date previous evidence records of the same type during the creation process, if an administrator has enabled the end dating feature for the evidence type. Caseworkers create an evidence record by recording the evidence in the first page of the evidence wizard. Then, if the end dating feature is enabled, a second page is displayed in the wizard where caseworkers can end date previous evidence records.

Before you begin

Note: This section applies only to evidence sharing with the evidence broker version 7.0.1.x and earlier, which corresponds to the value of the curam.aes.advancedEvidenceSharingEnabled property being set to NO. See the Evidence broker section for information about how sharing occurs when the curam.aes.advancedEvidenceSharingEnabled property is set to YES.

For information about enabling the end dating of previous evidence when creating evidence, see the related link.

About this task

For the evidence end dating option to be displayed to caseworkers in the second page of the evidence wizard, certain criteria must be met. For more information, see the related link to the *New Evidence* topic.

When an evidence record uses a **Preferred Indicator** and if the preferred indicator is set, the evidence record becomes the preferred evidence record even when other evidence records of the same type exist on the case. Only one preferred evidence record of the same type is allowed. Therefore, when a new evidence record is created with the preferred indicator set, and a preferred record exists, the following action occurs. The **Preferred Indicator** on the existing preferred evidence record is automatically cleared, whether it is set to `active` or `in-edit`. Then, the auto-unchecking of the preferred indicator on the evidence creates an `in-edit` record of the evidence. The caseworker must then apply the changes.

Use the following procedure to create an evidence record, and to end date previous evidence records.

Procedure

1. Log on to IBM Cúram Social Program Management as a caseworker user.
2. Open a person or an integrated case.
3. Click the **Evidence** tab.
4. To add an evidence record to the case, in the first page of the wizard, enter a new evidence record.
5. If the required value for the received date is different from the default value, enter a value for **Received Date**.
6. From the **Participant** list, select one or more participants that the data applies to.
7. Enter the new evidence record details.
8. Click one of the wizard's exit options, as outlined in the following table:

Option	
Save and Next	Saves the data and proceeds to the second page of the wizard.
Save and New	Saves the data and presents a new blank form to create multiple evidence records.
	Note: If **Save and New** is configured on the evidence type, the **Save and New** option is displayed on page one of the wizard only.
Save and Exit	Closes the wizard and saves the data on the page.
Cancel	Closes the wizard without saving the data.

9. In the second page of the wizard, choose one of the following options:

   - To continue without end dating any previous evidence records, do not select any evidence records and click **Finish**. No evidence records are end dated and the wizard closes.

   - To select previous evidence records for end dating, do the following substeps:

     a. Select the appropriate value for **Change Reason**.

     b. If the required value for the evidence end date is different from the default value, enter a value for **Evidence End Date**.

     c. Select one or more evidence records to apply the end date to. The evidence records that are displayed for selection for end dating are the most recent `active` or `in-edit` evidence records of that type, except for the evidence records that you created on the first page of the wizard. If an `active` evidence has an `in-edit` version, only the `in-edit` version is displayed.

     d. Click **Finish** to close the wizard and to save any data that has been entered into the page, or click **Cancel** to close the wizard without saving any data on the page. If you selected an evidence record but you didn't enter a value for **Change Reason**, **End Date**, or both values, when you click **Finish** a validation message is displayed.

Related concepts

New Evidence
A caseworker can use the new evidence function to capture evidence information for an evidence type.

Related tasks

Enabling the End Dating of Previous Evidence When Creating Evidence
An administrator can configure evidence types to allow the caseworker to end date existing evidence when creating evidence, depending on requirements. By configuring evidence to combine the creation and end dating of evidence, ending an evidence record is no longer a two-step process that requires unnecessary clicks and extra navigation. If the end dating feature is enabled for an evidence type, an end dating option is displayed in the evidence creation wizard for that evidence type.

Sharing data with external systems

You can share data that you receive from external systems across the system as part of a custom implementation.

Summary

A summary of the main evidence and evidence framework concepts.

Note: ⃞⊘EvidenceFlow is deprecated. For more information, see Deprecated features.

The main concepts covered in this overview are summarized as follows:

- An evidence record can relate to a person, prospect person, application or case. An evidence record can also relate to other evidence records, such as a parent evidence record.
- Evidence can be shared between a person / prospect person, application or case using the Evidence Broker.
- An evidence record can be verified using the Verification engine. Verifications can be configured to be shared using the Evidence Broker.
- Evidence records for an evidence type can be maintained from the in-edit, active, and evidence type lists.
- EvidenceFlow provides an alternate summary display and navigation through evidence.
- Evidence that is shared across multiple cases can be maintained from one evidence type list.
- Person or prospect person evidence can be maintained from the person tan, applications and cases.
- The system recognizes two types of evidence change: an evidence correction and a change in circumstance.
- Evidence approval checks can be set up to ensure that evidence changes are approved by a case supervisor.
- Evidence can be configured using the Dynamic Evidence editor, allowing administrators to dynamically design and maintain evidence types at run time in application administration.

Related concepts

Configuring Dynamic Evidence
Evidence Broker
Cúram Evidence Generator Business Guide

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