

Person Evidence Management

8.1.1

Enablement material

Agenda

1. Business Overview
2. Change of Circumstances
3. Technical Overview
4. Upgrade Considerations
5. Where to Find More Information

Business Overview

Who do we serve



Emma Harris

Delivery of Benefits
Caseworker; case
ownership model



David Nadar

Delivery of Benefits
Caseworker; work
queue driven
model

Targeting all caseworkers who
manage person evidence; both
Emma and David.

Person Evidence Management

- Person Evidence Management allows person evidence to be managed centrally independent of any benefit.
- Where an agency can streamline verification requirements across all benefits, Person Evidence Management allows an agency to verify this data once only for use on any application, providing efficiency gains to the agency.
- This person centric approach is especially advantageous to customers delivering benefits across multiple integrated cases:
 - Benefit access can be restricted to only the caseworkers who need it, to ensure data privacy of citizens, without impact on caseworkers having visibility on the latest person evidence.
 - All caseworkers have access to person evidence regardless of status and will not be asking citizens for evidence that has already been submitted to the agency.
 - Support for digital updates to person evidence extended by removing the correlation to benefit delivery or entitlement.
- Person Evidence Management cannot be used where there are benefit specific verification requirements on any of the 10 out-of-the-box person level evidence types. Customers may continue to use the existing approach and maintain person evidence within an integrated case and share these changes to person level.

Out-of-the-box person evidence types:

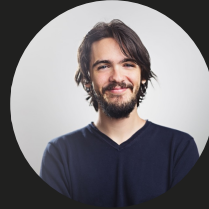
- ✓ **Addresses**
- ✓ **Ban and Death Details**
- ✓ **Gender**
- ✓ **Identifications**
- ✓ **Names**
- ✓ **Contact Preferences**
- ✓ **Phone Numbers**
- ✓ **Relationships**
- ✓ **Bank Accounts**
- ✓ **Email Addresses**

Change of circumstance

Our citizen Maria has recently moved address, and she calls the government agency she receives benefits from, to update her information.

David the caseworker, will change Maria's address.

This enhancement allows David to make the change within Maria's person profile where it can immediately be available to all other caseworkers



David Nadar
Delivery of Benefits, Caseworker

Change of circumstance

Cúram

Enter Name or Ref. Number or Keyw

Welcome SUPER USER

Home

Cases and Outcomes

Inbox

Calendar

Maria Hernandez X

Maria Hernandez

456 Orange, Midway, Utah, 84045
Female
Born 1/1/1996, Age 27

30000004

(0) Evidence In Edit

(0) Items to Verify

Not Recorded

Not Recorded

Home

Eligibility

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Incoming Evidence

Participant Data

Addresses

Bank Accounts

Contact Preferences

Email Addresses

Employment Status

Gender

Identifications

Names

Phone Numbers

Relationships

New Evidence

Open In New Tab

Issue

Items to Verify

Evidence In Edit

Select an evidence type for creation

Category

All

Type

Description

Addresses

Record addresses for the client such as their private and mailing address.

Add...

Bank Accounts

Record details of any bank accounts held by the client.

Add...

Contact Preferences

Records the preferred contact type when corresponding and language.

Add...

Email Addresses

Record email addresses that can be used when communicating with the client.

Add...

Employment Status

Employment Status

Add...

Gender

Record the gender of the client.

Add...

Identifications

Record different types of identification for the client such as passport.

Add...

Names

Record any names the client uses such as registered name or alternative names.

Add...

Close

Change of circumstance

New Addresses

Case Participant

Maria Hernandez (27)

Address Details

^

Type *

Private

From *

8/18/2023

To

M/d/yyyy

Please enter either Apt/Suite or Street 1.

Apt/Suite

Street 1

Street 2

City

County

State

Zip

84045

Preferred

Close

Cancel

Save & Exit

Save & Next

New Addresses

1 New Addresses

2 End Existing Addresses

End Addresses

Change Reason

Reported by Client

Evidence End Date

8/17/2023

End Existing Addresses

^

Select any record(s) which require an end date

<input type="checkbox"/>	Name	Evidence Description	Period
<input checked="" type="checkbox"/>	Maria Hernandez (27)	Private address is 456 Orange, Midway, Utah, 84045	8/18/2023 -

Cancel

Finish

Change of circumstance

Cúram

Enter Name or Ref. Number or Keyw

Welcome SUPER USER

HomeCases and OutcomesInboxCalendar

Maria Hernandez x

Maria Hernandez

Maria Hernandez

456 Orange, Midway, Utah, 84045

Female

Born 1/1/1996, Age 27

Not Recorded

Not Recorded

30000004

(2) Evidence In Edit

(2) Items to Verify

SUPER USER

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Email Addresses

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Relationships

New Evidence

Open In New Tab

Issue

Items to Verify

Evidence In Edit

All

Recorded

Change of circumstance

Maria's address change is in an in-edit state awaiting the necessary verification. A few days later, Maria provides the required proof of address to the government agency.

Emma the caseworker, will now verify the address change for Maria.

Again, this change is made within Maria's person profile where it can immediately be available to all other caseworkers



Emma Harris
Delivery of Benefits, Caseworker

Change of circumstance

Cúram

Enter Name or Ref. Number or Keyw

Welcome SUPER USER

HomeCases and OutcomesInboxCalendar

Maria Hernandez x

Shortcuts

Maria Hernandez

Maria Hernandez

456 Orange, Midway, Utah, 84045

Female

Born 1/1/1996, Age 27

30000004

(2) Evidence In Edit

(2) Items to Verify

SUPER USER

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Home

Sensitivity1

Preferred Public Office

Special Interest

Registration Date8/18/2023

Receive Deduction Payment Details

Currency

Payment Frequency

Method Of Payment

Next Payment Date

Comments

Pending Applications

Current Cases

Smart Panel

Change of circumstance

Cúram

Enter Name or Ref. Number or Keyw

Welcome SUPER USER

Home

Cases and Outcomes

Inbox

Calendar

Maria Hernandez

Maria Hernandez

456 Orange, Midway, Utah, 84045

Female

Born 1/1/1996, Age 27

Not Recorded

Not Recorded

30000004

(2) Evidence In Edit

(2) Items to Verify

SUPER USER

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Incoming Evidence

In Edit Evidence

New Evidence

Open In New Tab

Type	Description	Period	Latest Activity
> Addresses	Private address is 123 Lemon, Midway, Utah, 84045	8/18/2023 -	Created by SUPER USER on 8/18/2023
> Addresses	Private address is 456 Orange, Midway, Utah, 84045	8/18/2023	SUPER USER on 8/18/2023 01:28

Change of circumstance

Cúram

Enter Name or Ref. Number or Keyw

Welcome SUPER USER

Home

Cases and Outcomes

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Calendar

Maria Hernandez

Maria Hernandez

30000004

(2) Evidence In Edit

(2) Items to Verify

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Verifications

Outstanding

All

Item for Verification	Evidence Type	Mandatory	Due Date
> State	Addresses	No	Add Proof
> State	Addresses	No	Add Proof

Change of circumstance

HomeCases and OutcomesInboxCalendar

Maria Hernandez x

Maria Hernandez

30000004

(2) Evidence In Edit

(0) Items to Verify

SUPER USER

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Maria Hernandez x

Maria Hernandez

30000004

(0) Evidence In Edit

(0) Items to Verify

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Dashboard

Active Evidence

In-Edit Evidence

Verifications

Issues

Incoming Evidence

Type	Description	Period	Latest Activity
> Addresses	Private address is 456 Orange, Midway, Utah, 84045	8/18/2023	SUPER USER on 8/18/2023 01:49
> Addresses	Private address is 123 Lemon, Midway, Utah, 84045	8/18/2023 -	SUPER USER on 8/18/2023 01:49
> Birth and Death Details	Born 1/1/1996	8/18/2023 -	SUPER USER on 8/18/2023 01:16
> Gender	Female	8/18/2023 -	SUPER USER on 8/18/2023 01:16
> Identifications	Reference Number 300000004	8/18/2023 -	SUPER USER on 8/18/2023 01:16
> Names	Maria Hernandez is the Registered name for this client.	8/18/2023 -	SUPER USER on 8/18/2023 01:16

Technical Overview

Person Evidence Management

- Person Evidence Management utilizes a new case construct Person Evidence Case (PEC) to deliver the evidence workspace.
 - It allows for person evidence captured at the Person level to make use of the full evidence lifecycle to support the centralization of person evidence.
 - It is a system level case not visible to users of the application.
 - It is a new/separate case which is a new, additional layer on top of existing participant data case.
 - Tight synchronization between these two cases provided for the 10 out-of-the-box evidence types ensure any existing usage of person evidence is unimpacted.

The 10 out-of-the-box evidence types are:

- ✓ *Addresses*
- ✓ *Bank and Death Details*
- ✓ *Gender*
- ✓ *Identifications*
- ✓ *Names*
- ✓ *Contact Preferences*
- ✓ *Phone Numbers*
- ✓ *Relationships*
- ✓ *Bank Accounts*
- ✓ *Email Addresses*

Using Person Evidence Management

- Administrators can enable Person Evidence Management processing by setting the system property in the administration application to YES. By default this property is set to NO.

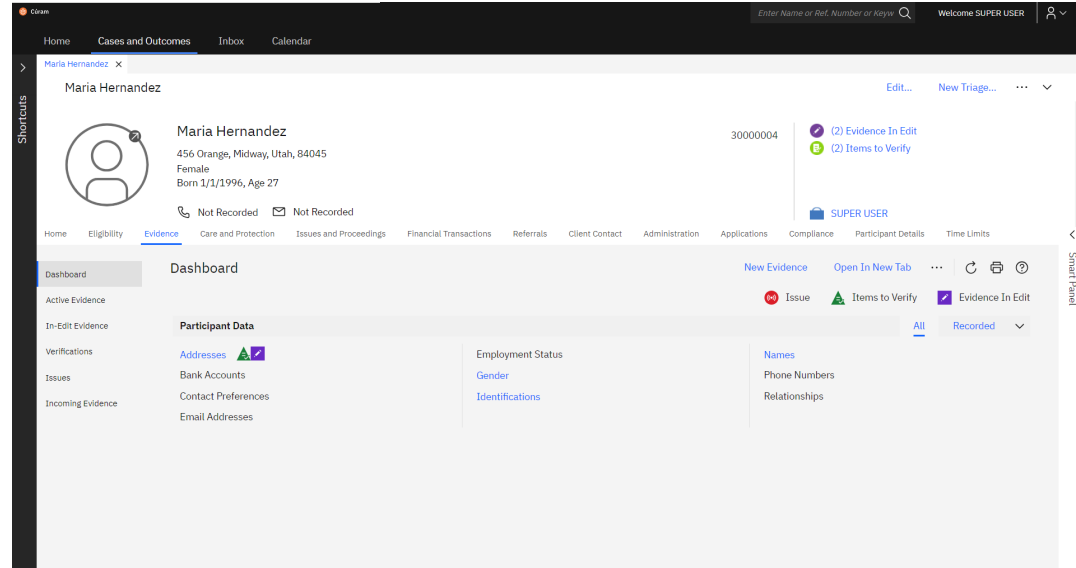
Note: Once enabled, we recommend that you do not disable Person Evidence Management as enabling it determines a way of managing person and prospect persons.

- When Person Evidence Management processing is enabled, administrators can configure evidence, verifications, and the smart navigator.

Sysadmin properties	Default value	Description
Enable Person Evidence Case (curam.pec.enabled)	NO	Determines whether Person Evidence Management is enabled for persons/prospect persons.
Enable Demographics (curam.pec.demographicsenabled)	NO	Determines whether the demographics tab is enabled for persons with an underlying person evidence case.

Using Person Evidence Management

- Person Evidence Management provides a full evidence lifecycle for all evidence types that are configured for a person or prospect person, enabling maintenance of evidence at the person level.
- An evidence dashboard view and active and in-edit lists provide caseworkers with a consistent user experience for managing evidence across the system.
- Evidence can exist in both an in-edit and active state and remains in-edit until it is activated. Evidence for which one or more mandatory verifications have been configured cannot be activated until outstanding verifications are satisfied.
- Context panel provides the ability to view:
 - **Items to verify**
When caseworkers select the Items to Verify link, the Outstanding in-line tab on the verifications page opens.
 - **In-edit evidence records**
When caseworkers select the Evidence in Edit link, the In Edit Evidence list page opens.



Maintaining Person Evidence at Integrated Case level

- Customers opting **not** to use Person Evidence Management may continue to use an integrated case to maintain person evidence and share these changes to person level where it is stored on a participant data case.
- No updates are required within the administration application as, by default, the property for Person Evidence Management is not enabled.
- Evidence at the person level remains as is i.e. with an active evidence list page.
- Synchronization is not applicable since it is only by enabling Person Evidence Management that synchronization between person evidence case and participant data case is required.
- Only one approach can be used by customers for maintaining the 10 out-of-the-box person evidence types, either using Person Evidence Management or Maintaining Person Evidence at Integrated Case level. It is not possible to use a mixture of both approaches.

The screenshot shows the Cúram application interface. At the top, there's a navigation bar with 'Home', 'Cases and Outcomes', 'Inbox', and 'Calendar'. Below this, a search bar and 'Welcome SUPER USER' are visible. The main content area is titled 'Maria Hernandez' and includes a profile card with a placeholder image, name, address (456 Orange, Midway, Utah, 84045), gender (Female), and birth date (Born 1/1/1996, Age 28). Below the profile card, there are two status indicators: 'Not Recorded' with a phone icon and 'Not Recorded' with an envelope icon. The 'Evidence' section is highlighted in the left sidebar, and the main table displays the following data:

Type	Description	Source	Period	Latest Activity
> Addresses	Private address is 456 Orange, Midway, Utah, 84045	Person Record	2/13/2024 -	SUPER USER on 2/13/2024 09:56 Edit ...
> Birth and Death Details	Born 1/1/1996	Person Record	2/13/2024 -	SUPER USER on 2/13/2024 09:54 Edit ...
> Gender Details	Female	Person Record	2/13/2024 -	SUPER USER on 2/13/2024 09:55 Edit ...
> Identifications	Reference Number 30000001	Person Record	2/13/2024 -	SUPER USER on 2/13/2024 09:54 Edit ...
> Names	Maria Hernandez is the Registered name for this client.	Person Record	2/13/2024 -	SUPER USER on 2/13/2024 09:54 Edit ...

Upgrade Considerations

- When enabling Person Evidence Management, two main areas must be addressed:
 1. Configuration specific to participant data case must be updated to reference person evidence case.
 - Participant verification configurations to be removed from participant data case and re-applied to person evidence case.
 - Participant data case evidence sharing configurations to be removed and recreated against person evidence case.
 2. Data tied to participant data case must be migrated to person evidence case.
 - The PEC Migration Batch process is provided to facilitate the migration of data from participant data case to person evidence case. This manages data migration from a default product standpoint and acts as a foundation that customers can build upon based on their specific customizations.
- **Customers are responsible for their own rulesets** and therefore will need to make the changes required given that common person evidence is no longer on an integrated case and instead on a person evidence case.

Where to Find More Information

- Merative Social Program Management Documentation 8.1.1
 - What's New in Cúram 8.1.1
 - Person Evidence Management Guide
 - Cúram Upgrade Guide (Section 10.30 PEC Migration Batch)

Thank you

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