



# **Merative Social Program Management 8.1**

**Family Services Suite Configuration Guide**



## Note

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Before using this information and the product it supports, read the information in [Notices on page 47](#)



# Edition

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This edition applies to Merative™ Social Program Management 8.0.0, 8.0.1, 8.0.2, 8.0.3, and 8.1.

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# 1 Configuring Cúram Family Services Suite

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Cúram Family Services Suite has a range of configurable parameters that allow administrators to manage functions such as age parameters, search parameters, or notifications.

## Purpose

A range of configuration options for an administrator of solutions developed as a part of Cúram Family Services Suite (CFSS) are outlined. The options include configurable parameters that allow the Administrator to manage an array of CFSS functions, including defining the age parameters, search parameters, configuring notifications, and so on. The configurable options that are outlined are applicable to all solutions within CFSS or are specific to a single solution as defined.

## Audience

Administrators responsible for configuring any solution in the CFSS are the target audience. The audience must be familiar with management of Cúram's administrative functionality, including (but not limited to) code tables, application properties, and system security.

**Note:** System administrator security access is required to update application properties.

## 1.1 Cúram Family Services

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Configurable options are available to an administrator of either Child Services (CCS) or Youth Services (CYS).

## Configuring Notification Requests

Cúram provides the ability, as part of its framework, to generate notifications or correspondence. CFSS extends the functionality to allow the administrative definition of when an activity or event (e.g. return home of a child from a placement or facility) might result in such a notification. The notification request administration also provides the ability associate specific templates per communication method type (e.g. mail and email templates) per activity/event. The intention of this functionality is to allow individuals (e.g. participants of a case, collaterals of a case, persons or organizations impacted by a case, etc.) who have the right or need to receive notification regarding actions of a case the ability to be easily identified by the case worker.

### How

Access the Family Services administration area of the application, and access the Notification Requests area. From here, the administrator may create a new request or manage an existing request configuration.

Each notification request will include the following details:

- A workflow event to be associated with the notification request
- A template for each method of communication

### **Outcome**

Notification events configured for the CFSS case will be available to the case worker to create a notification request for a case participant. For example, if an administrator defines Case Closure as a notification event with the specified templates for phone and hard copy notifications, then the case worker will be able to create a notification event for a case participant. This will result in a notification being created, based on the case participant's preferred communication method, upon the closure of the case.

## **Configuring Units of Measure**

CFSS provides the ability to capture and manage participant data, including their physical description. As a global product, CFSS provides the ability to configure the units of measure to manage a person's physical description via the application property. This primarily relates to height and weight. Height can be measured in meters or feet. Weight can either be measured in kilos or pounds.

### **How**

Access the property administration area of the application. Select the following application property to modify the unit of measure for a person's height:

`curam.cfss.physicaldescription.heightUnit`

This property is maintained in the Family Services Configuration – CFSS Common category.

Select the following application property to modify the unit of measure for a person's weight:

`curam.cfss.physicaldescription.weightUnit`

This property is maintained in the Family Services Configuration – CFSS Common category.

### **Outcome**

The height and weight units are configured and available in the application.

## **Configuring Milestones**

Milestone functionality is used to track the completion of significant events or tasks during the life of a case. Cúram provides the ability to administer milestone functionality for different case types, including integrated (Ongoing, Adoption and Youth Services) and screening (Intake) cases. A milestone may be created manually by a user or automatically based on events that occur within a case.

### **How**

Access the case administration area of the application. Select the Cúram case type, and navigate to the milestones section of the case configuration. From here, the administrator may associate a new milestone with the Cúram case type or manage existing milestone configurations for the Cúram case type.

### **Outcome**

A milestone is configured for the selected case type.

## Milestone Configurations

Each milestone has an expected start and end date during which the important event is scheduled to start and complete and an actual start and end date. Cúram case management provides functionality to set up the milestones. Note, however, some development is required to create milestone deliveries at the case level. All case milestones are based on an associated milestone configuration. The following table describes the available milestone configuration settings (both optional and mandatory):

Table 1: Milestone Configuration Settings

Configuration Settings	How Used	Optional or Mandatory
Name and Type	The name and type are used to distinguish the milestone configuration. When creating a manual milestone, a user must select the milestone configuration to be applied using the milestone configuration name.	Mandatory
Earliest Start Day (days)	This setting is used to determine the expected start date for automatically created milestones. The expected start date is set to the current date on which the milestone is created plus the number of days defined here. For example, if the milestone is created on April 1 and this setting is 3, then the expected start date of the milestone is set to April 4. Also, this setting is used to validate the Expected Start Date entered by a user when manually creating a milestone. A milestone cannot have an Expected Start Date earlier than this number of days after the start date of the case.	Mandatory
Duration (days)	This setting is used to determine the expected end date for all milestones. For manually created milestones, the expected end date is set to the user entered expected start date plus this duration minus one. For example if the expected start date is April 1 and the duration is 7 days, the expected end date is set to April 6. For automatically created milestones, the same calculation is applied to the expected start date defined by the date on which the milestone was created and the Earliest Start Day (days).	Mandatory
Start Date	The start date determines the active, and thus availability, period of the milestone configuration.	Mandatory
End Date	The end date determines when the milestone configuration is no longer active. This date is not mandatory as milestone configurations can remain active for an indefinite time period.	Optional
Expected Date Extension Allowed	This indicates whether or not the expected start and end dates for an automatically created milestone can be redefined. If this indicator is not set, then the expected start and expected end date calculated upon creation of a milestone are unchangeable.	Optional

Configuration Settings	How Used	Optional or Mandatory
Waiver Required	This indicates whether or not a waiver is required in order to change the expected start and expected end date for an automatically created milestone. This can only be set for milestone configurations which allow the expected dates to be extended (as described in the setting above). Milestone Waivers are described later in 2.4.5 Milestone Waiver Request Approval.	Optional
Milestone Added	Any existing workflow event can be associated with the creation of a milestone. This event can be used to extend the milestone creation processing. For example, when a milestone is added, a workflow can be enacted to notify the case owner.	Optional
Milestone Complete	Any existing workflow event can be associated with the completion of a milestone. This event can be used to extend the milestone completion processing. For example, when a milestone is completed, a workflow can be enacted to notify the case owner.	Optional
Expected Start Date Not Achieved	Any existing workflow event can be associated with the expected start date in order to track the timeliness of the milestone. For example, if no actual start date is entered for the milestone and the expected start date passes, a workflow can be enacted to notify the case owner that the milestone has not yet started.	Optional
Expected End Date Not Achieved	Any existing workflow event can be associated with the expected end date in order to track the timeliness of the milestone. For example, if no actual end date is entered for the milestone and the expected end date passes, a workflow can be enacted to notify the case owner that the milestone has not been completed in a timely fashion.	Optional

### ***Associating Milestones with Cases***

To support the manual and automatic creation of milestones within a case, it is necessary to set up an association between a milestone configuration and the case type (e.g., integrated or screening case type). There are two options for setting up these associations: either a new milestone configuration can be recorded at the same time it is associated with the case type or an existing milestone configuration can be selected.

When recording a new milestone configuration as part of the association process, the milestone configuration information (as described in section Milestone Configurations) must be defined. Additional association information can also be defined if the milestone is to be created automatically. The two main configuration settings for automatically created milestones are the creation event and the completion event. These events are used by the application to automatically create and complete an instance of the milestone. For example, a milestone can be set up to track the completion of an assessment. To set up the automatic creation of this milestone, a case event (e.g. Case is reopened) can be selected as the creation event and another case event can be selected as the completion event. When the first case event occurs, the event will trigger

an instance of the milestone. The second event will result in the closing or completion of the milestone instance.

The matching process for creating milestones within a case can be further specified using the component type and component category settings. A clear distinction can be made between creation and completion events at the case level and at the case component level. For example, the case component, Legal Action, can be set, with a creation event of Create Legal Action and a completion event of Complete Legal Action. When a legal action is created, the Create Legal Action event will trigger an instance of the milestone and the application will associate both the Legal Action ID and the case ID with it. Later when the Legal Action is completed, the Close Legal Action event will use both of these IDs to find and close the correct milestone instance.

### ***Milestone Waiver Request Approval***

Given that milestones are used to track important case events over time, a milestone waiver request may be required in order for the milestone expected start and end dates to be changed for an automatically created milestone. Expected start and end dates for manually created milestones can be changed without a waiver request. The milestone waiver request approval process is used to confirm that the changes in dates to the milestone are valid. Once a submitted request has been approved, the new expected start and/or end dates will take effect.

Milestone waiver requests can only be submitted (i.e., the expected dates for a milestone can only be changed) if the Expected Date Extension Allowed setting has been configured. The approval process (i.e. the need to submit a waiver request for approval) for these requests will only be necessary if the Waiver Required setting has also been configured. If the Waiver Required setting has not been configured, a user will be able to change the expected start and/or end dates directly.

Milestone waiver request approval check settings for a milestone determine the percentage of submitted waiver requests for a milestone of a particular type that need to be reviewed by a case supervisor. For example, an approval check can be set up on a milestone that requires 60% of all submitted requests to be approved; 40% will not require approval. Setting approval checks at the milestone level governs all milestones of a particular type. Milestone waiver request approval checks can also be set up at the organization and user level, with user configuration settings taking precedence over organization unit and milestone settings, and organization unit settings taking precedence over milestone settings. Consequently, the approval check settings for a particular type of milestone are the last step in the system's evaluation of whether or not a waiver request requires approval. In other words, when a waiver request is submitted for approval by a user, the system first checks the user's milestone waiver request approval check settings, and then checks the milestone waiver request approval check settings for the organization unit that the user belongs to. After checking these settings, the system checks the approval settings at the milestone level. The system may determine at any point in this process that the milestone waiver request requires approval.

## **Contact Compliance**

A key operational activity which can consume the majority of a worker's time is the documentation of contacts made with children or families. To help ensure contacts are made in a timely manner, and in line with organizational policy, CFSS includes a number of features which can be used to define compliancy.

For investigations, the objective is to quickly contact an alleged victim within X days. The timeframe is based on the Respond Within value associated with the investigation. Compliance

with local policy can also be configured based on Contact Purpose (e.g. Alleged Victim Contact), Contact Type (e.g. Home Visit) and Contact Methods (e.g. Phone).

With other situations such as dealing with a child in foster care or incarcerated, there are often standards which determine how frequently contacts need to be made. In addition to the parameters mentioned above, frequency and Placement Type can be used to define compliance for other CFSS case types. For example, compliant contacts for children in foster care may require monthly face-to-face contact, while children in an adoptive placement may require weekly phone contacts with the child.

## How

Access the Family Services administration area of the application, and access the Contact Log Administration area. From here, the administrator may configure the compliance criteria associated with the contact logs for a Cúram case type. Configurable compliance criteria includes

- Case Type
- Contact Purposes
- Contact Types
- Contact Methods
- Contact Frequency
- Placement Type (to define frequency of contact required)

## Outcome

Contact Log parameters associated with investigation cases are used to alert investigators how many days remain before their initial contact is considered overdue. Contact Log pods prominently displayed on the user's home page list names of children who need to be contacted and the number of days remaining. Contact Log entries can be completed for one or more individuals using capture contact functions available directly from the pod or from navigation available within the case.

Caseworkers also have a Contact Log pod which lists names of children on their caseload that need to be contacted. The last contact date, whether or not the child is in placement and the child's next court date is displayed to help the worker prioritize and schedule contacts.

## Contact Log Configurations

The following configurations are included with the application out of the box.

Table 2: Contact Log Configurations

Case Category	Case Type	Purposes	Types	Method
Investigation	Child Services	Initial Contact with Alleged Victim, Alleged Victim Contact	Foster Home Visit, Home Visit, Interview	Face to Face
Integrated Case	Ongoing	Assessment Discussion Entry, Discharge Planning, General Participant Contact Entry	Foster Home Visit, Home Visit, Interview, Office Visit, Site Visit	Face to Face

Case Category	Case Type	Purposes	Types	Method
Integrated Case	Adoption	Assessment Discussion Entry, Discharge Planning, General Participant Contact Entry	Foster Home Visit, Home Visit, Interview, Office Visit, Site Visit	Face to Face

## Placement Type Mapping

This feature, is intended to significantly simplify the end user process for completing placements. In prior versions, the user was required to identify both Placement Type and Service Offering before conducting a provider search. With this feature, the mapping of Placement Type to Service Offering can be defined administratively thus reducing the steps required by the end user. For example, in the past, the user might indicate a Placement Type of Foster Care, then also have to select from relevant Service Offerings such as Traditional Foster Care, Treatment Foster Care, etc.

### How

Access the Family Services administration area of the application, and access the Placement Type Mapping area. From here, the administrator may map a family services placement type to a specific Cúram Provider Management (CPM) service offering. Configurable values include the placement type and the CPM service offering.

### Outcome

Identification of a Service Offering is no longer required when searching for appropriate placement provider or creating a placement record.

### Placement Mapping Configurations

The following configurations are included with the application out of the box.

Table 3: Placement Type to Service Offering Mapping

Placement Type	Service Offering
Foster Care	Traditional Foster Care
Adoption	Traditional Adoption
Runaway	NONE
Trial Home Visit	NONE

## 1.2 Child Services

Certain configurable options are specific to a Child Services administrator.

### Age of Majority

The age of majority (or maximum age for a child) is controlled by the Maturity Age rate table. This table defines the age up to which a person is considered as a child in CCS. The maturity age (also known as the age of attrition or the age of maturity) is an important factor during the

management of a participant in a CCS. For example, in child welfare, a child can be removed from his or her home and maintained by the organization in an out-of-home setting until he/she reaches the age of maturity. The maturity age can be different for various jurisdictions. CCS provides the ability to define the age when a person is considered an adult (the ADULT age) as well as (for the United States' IV-E eligibility rules) the age of exception (EXTENDED AGE) for rules processing.

### **How**

Access the system administration area of the application to navigate to the rate tables. From here, the administrator may manage the Maturity Age rate table. The age limit for a child in the solution is based on the value set in the rate table.

### **Outcome**

A child beyond the Maturity Age cannot be removed or placed in a child welfare case.

A child beyond the Exception Age may fail IV-E eligibility (US only).

## **IV-E Eligibility**

IV-E Eligibility is a United States specific feature that provides the ability to capture evidence regarding children in care to determine whether they are deemed eligible for Title IV-E reimbursements. Child Welfare provides an unsupported sample implementation that includes the ability to capture evidence and check eligibility through the execution of a sample Classic rule set. A IV-E Eligibility tab where evidence can be captured and eligibility determined can be enabled within the Ongoing case.

### **How**

Access the system administration area of the application to navigate to the **Property Administration** page in the **Application Data** section. Search for the application property *curam.cfss.iveeligibility.enabled* that is set to false by default but when enabled results in the display of a IV-E Eligibility tab in the Ongoing Case.

### **Outcome**

When accessing the Ongoing Case home page in the application, the IV-E Eligibility tab in the case will be visible or not visible based on the value selected for the application property.

## **Integrating child welfare intake with an external system**

The Child Welfare intake module can be integrated with an external system that manages the investigation or ongoing case phases of the child welfare lifecycle.

Child Welfare intake can notify an external system when an intake is approved. The notification is created when an intake is approved both manually and automatically for the three following intake types that include an approval process:

- Child protection services
- Family services
- Inter-jurisdictional



As part of the notification, a preliminary set of data about the intake is provided to the external system. The data set consists of intake details that does not include sensitive PI. The data, including the Intake ID, Intake Category, Intake Type, Recommendation, and Response Priority, can be used to create a case in the external system based on the type of intake approved.

The external system can then provide the Intake ID received with the notification to retrieve more intake data for further processing. The data available to the external system includes Intake-specific data and participant data for the various types of Intake Participants. The data available is as follows:

- Intake Summary Details
- Narrative
- Intake Participants
- Probable Match
- Reporter
- Collaterals
- Providers
- Relationships
- Allegations
- Contact Logs
- User Roles
- Recommendation

For all participant-related details that are stored as read-only snapshot data during the intake approval process, the details that are provided to the external system are retrieved from the snapshot tables instead of the regular database tables.

### ***Activating the investigation and outbound services to notify external systems***

At the end of the Child Welfare intake process, the intake worker submits the intake for approval. The intake is now ready to move to the investigation phase. An external system manages the investigation phase and so must be notified when a new approved intake must be processed. Cúram provides Service Provider Framework and OOB (out of the box) service implementations: the **Investigation** and **Outbound** services to support the investigation phase. When a child welfare intake is approved, the **Investigation** service assembles the approved intake metadata and the **Outbound** service notifies the external system. The outbound service performs a RESTful POST operation to a resource available on the external system. The POST sends a JSON object that contains all the relevant meta information about the approved intake. The POST notifies the external system that the intake is approved and allows it to perform some basic logic on the information provided.

### **Procedure**

OOB implementation:

1. Turn on the investigation service to send notifications:
  - a) Log in as system administrator (sysadmin) and browse to the **System Configurations** tab.
  - b) Open the **Shortcuts** panel and select **Application Data > Property Administration**.
  - c) On the **Property Administration** panel, select **Family Services Configuration - Child Services Configurations** in the **Category** drop-down.
  - d) Click **Search**.

- e) Locate the property *curam.cfss.ccsIntakeApproval.externalSystemNotification* and set it to **true**.
  - f) Click **Publish** to update the system properties.
2. When the system is turned on, you must define the external target system and its service:
  - a) Select **New** to create a new external system.
  - b) Enter a system name for the new external system. For example, *external\_notification\_system*.
  - c) Enter the root URL of the external system. For example, "*http://domainname:portnumber*"
3. Add a service to the new target system:
  - a) Select **Add Service**.
  - b) Select **CS Approval Notification** from the drop-down as the service name.
  - c) Add the extension URL, this URL is the path of the resource on the external system. For example, */externalsystem/notifications*.
  - d) Add the username and password by using a recognized external system system-level user name and password.
4. Configure the outbound service to use the new target system by setting the system property: *curam.cfss.ccsIntakeApproval.externalTargetSystemName*.
  - a) Navigate to the **System Configurations** tab, open the **Shortcuts** panel, and select **Application Data > Property Administration**.
  - b) On the **Property Administration** panel, select **Family Services Configuration - Child Services Configurations** in the **Category** drop-down.
  - c) Locate the property: *curam.cfss.ccsIntakeApproval.externalTargetSystemName*.
  - d) Set the value of *curam.cfss.ccsIntakeApproval.externalTargetSystemName* to match the system name of the new external system. For example, *external\_notification\_system*.
  - e) Click **Publish** to update the system properties.

Custom implementation:

Cúram provides the default OOB implementation. However, you might want to choose a different web service technology or protocol to suit your requirements. The Service Provider Framework exposes a service provider interface (SPI) which you can implement to provide your own customized Outbound Service. For more information, see *Developing Social Program Management applications*. To provide your own custom outbound service implementation and register it with the Service Provider framework, take the following steps:

5. Your Custom Outbound Service Class must implement the outbound service interface *curam.cfss.ccs.spi.impl.OutboundSPI.java*, then override its *makeOutboundCall* method and provide the new implementation code. You must use three parameters that are passed in the *makeOutboundCall* method signature to implement the outbound service interface:
  - *LinkHashMap<String,String>* set of attribute name-value pairs that relate to the approved intake.
  - *TargetSystemUtil* has three methods:
    - *getTargetSystemName(): String*, the name specified in *curam.cfss.ccsIntakeApproval.externalTargetSystemNamesystem* property
    - *getTargetSystemCredentials(String systemName): TargetSystemDtls* searches for a registered Target System in Cúram.
    - *getTargetServiceCredentials(long systemId): TargetSystemServiceDtls* searches for a *CS Approval Notification* service that is registered for a given *TargetSystem*

- *LoggerUtil* is a utility class that supports writing to the system log  
*log(org.apache.logging.log4j.level priority, String message)*
6. To register the custom *Outbound Service* class, you must:
    - a) Implement a custom Module class that extends *com.google.inject.AbstractModule*.
    - b) Override the configure method and update the Guice bindings to specify the new Custom Outbound Service Class.

Code example:

```
import com.google.inject.AbstractModule;

/**
 * The module which contain the Guice bindings for core.
 */
public class Module extends AbstractModule {
    /**
     * Default constructor.
     */
    public Module() {
        super();
    }

    @Override
    public void configure() {
        //This is were you will bind the new custom outbound service class to the
        //Outbound Service Interface.
        binder().bind(curam.cfss.ccs.spi.impl.OutboundSPI.class)
            .to(TheNewCustomService.class);
    }
}
```

You can customize an outbound service implementation in the same way as described for the OOB outbound service implementation.

7. The Service Provider Framework also supports customization of the Investigation service. You can customize the investigation service by implementing the investigation service interface *curam.cfss.ccs.spi.impl.InvestigationSPI.java* and providing a *Custom Investigation Service Implementation* in the same way as described. To implement a custom Investigation service requires an advanced knowledge of the child welfare domain.

## Results

The OOB service providers log all relevant actions and responses in the system log that can help you in configuration and debugging.

- All successful POSTs with the CaseID, 200 or 201 response codes and response messages are logged.
- All failed POSTs with CaseID, response codes, and response messages are logged in the system log.
- Any unexpected exceptions such as IO failures, JSON formatting failures, external system internal errors, or resources that are not found are managed and logged to the system log along with the intake ID.

## Related tasks

## ***Accessing the Child Welfare web API***

External systems can use the Child Welfare API to retrieve the details of an approved SPM Child Welfare Intake so that the next step in the process can be initiated.

### **Overview**

The API endpoint is accessed by an authorized client that wants to query specific data by providing an intake ID.

The GET request for intake data uses the provided query parameter, an intake ID to search for and retrieve data about that intake. A JSON response is then constructed and returned to the requesting client.

Clients must use the HTTP protocol and be authorized to access the endpoint to request intake data. Intake data that is contained in the response to the client cannot be customized by using this endpoint, therefore some of the information that is returned might be irrelevant for the client's use case.

### **HTTP GET request**

A client makes an HTTP GET request to: `https://hostname:portNumber/Rest/v1/childwelfare/intakeaggregates/{intake_id}` passing a valid intake ID as a path parameter. The request then returns existing data based on the JSON schema.

The following parameters are included in the request:

- Intake ID
- Path parameter

When the request is completed, the resource that is created to serve the request is deleted and the system thread returns to waiting for new client requests.

The calling client for this feature is typically an investigation system that is modeled on an existing SPM child welfare investigation business work flow. The external system begins its investigation process by using the intake data that is retrieved from this endpoint.

## ***1.3 Child Welfare Pods***

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Pods can be implemented that are specific to the Merative™ SPM Child Welfare application.

The following pages describe the pods that are implemented specifically as part of the Child Welfare application. Details regarding the reporting-based pods are not included. This includes pods that are implemented for the following user roles:

- Intake worker & Supervisor
- Investigator & Investigation Supervisor
- Ongoing & Adoption Workers
- Ongoing & Adoption Supervisors

These pods are based on the pod infrastructure available as part of the application's core framework. No enhancements are made to the existing infrastructure. Instead, new pods have been implemented to meet child welfare-specific needs.

## Intakes to be Completed

The Intakes to be Completed pod will list all Child Protection Services, Family Services and Inter-Jurisdictional intakes that still need to be submitted for approval. A hyperlink will be available on the bottom of the pod that will provide access to the full list that will open as a page tab under the Intakes section. The Intakes to be Completed pod will only show 5 records in the pod.

The pod will include:

- A link to the intake (which will open the intake home, not the intake assistant, in the intakes section)
- A link to the Complete Recommendation modal (if all mandated information has been captured)
- The receipt date of the intake
- The intake category

## Initial Contacts Due

An investigator is required to make initial contact with a child (e.g. Alleged victim) within a certain period of time. That period is based on the response time identified in the originating recommendation (i.e. 24 hours, 3 days or 10 days) and the submission date of the recommendation. The pod will provide the following functions:

- Link to “Go to Initial Contacts Due” provides a hyperlink to open the full list in a new tab under the investigations section.
- “Capture Contact” button provides a link to Capture Contact from the pod (or the list). This allows the user to capture contacts outside the context of the investigation, but store the contact details in the selected investigation.
- The Name column lists the clients name and the case id they belong to, and will act as a link to the investigation in the Investigations section. It will include all children involved in a child protection investigation that do not have an initial contact record captured.
- The Time Left column will be determined based on the following criteria:
  - Based on the response priority assigned (i.e. 1 day, 3 days, 10 days) and the date of original task assignment (or intake approval date). For example, if the “Respond Within” is 3 days and the intake approval happened 2 days after the intake was submitted, then the “Time left” will be calculated: 3+2, i.e. 5 days.
  - To derive the time left when the “Respond Within” field is not populated, the administration has included a default value so that if no response priority is assigned, the initial default is set to 10 days.
  - If there are two intakes of common participants associated to an investigation case, each of different response priority values, in that case the lowest value will be listed first.
  - If the initial contact due date has exceeded the given date, then it will be considered as overdue initial contacts and it will be indicated with a negative sign before the actual number.
- The sort for the Initial Contacts Due will default the least “Time Left”, with the one due soonest (or overdue the most) on top. Configuration parameters include:
  - Respond Within: These values can be modified via a code table

- **Acceptable Contact:** Under the Family Services administration, the user may define contact log parameters (e.g. Purpose, type, etc) that would be considered an acceptable “initial contact” record.

### **List Page**

The list page includes the same information as available and presented on the pod, as well as the location of the child and the next court date. The data is based on the following conditions:

- The location is the current placement of the participant.
  - If the participant is known to be in placement, this will indicate “In Placement”.
  - If an address is entered for the participant and no removal record/placement exists, then this column will indicate “At Home”.
  - If no address is available and no removal is captured, then this column will indicate “Unknown”.
  - If a removal record exists, but no placement record is entered, then this column will indicate “Unknown”.
  - If an address is entered, a removal exists and there is no placement record entered, then this column will indicate “Unknown.”
  - If no address is available, a removal exists and there is no placement record entered, then this column will indicate “Unknown.”
- The next court date will be based on the next hearing date. The system will review all Legal Category of type "Hearing" associated with the case, and look for the next scheduled hearing.

The list page also includes the full list of children requiring an initial contact, while the pod only includes the first 5 persons requiring a contact.

## **Ongoing Contacts Due**

A caseworker is required to make ongoing contacts with a child under the purview of the agency. The pod will provide the following functions:

- Hyperlink to open the full list in a new tab under the cases & plans section.
- Link to Capture Contact from the pod (or the list). This allows the user to capture contacts outside the context of the case, but store the contact details in the selected case.
- The Name column lists the clients name and the case id they belong to, and will act as a link to the case in the cases & plans section.

The sort order for the Ongoing Contacts will be based on the last contact date, with the latest contact being displayed first. Configuration parameters include:

- **Acceptable Contact:** Under the Family Services administration, the user may define contact log parameters (e.g. Purpose, type, etc) that would be considered an acceptable “contact” record.

## 1.4 Outcome Management for Child Services

The default outcome management configurations included with CCS include assessment and plan configurations.

### Assessment Page Configuration

The assessment page can be configured to present either the Outcome Management or Merative™ SPM Platform assessments on the assessments list.

Then, when selecting to create a new assessment, the list of available assessments are either assessments that are configured in Outcome Management or assessments that are configured in Merative™ SPM Platform.

Navigate to the User Interface section of the administration and set the assessment page of a specific case to call the Outcome Management UIM (Case\_listAssessmentDeliveries) instead of the standard Merative™ SPM Platform UIM.

### Outcome Management Configurations

The outcome plan will replace the former Case Plan and Case Review functionality. Outcome management configuration settings provide a number of configuration points for managing child welfare and youth service plans. This includes the details of the plan itself, goals, objectives, activities, factors, etc. This information identifies the configurations included by default in the CCS application.

#### How

Navigate to Outcome Plan via the Outcome Management section of the administration. From here, the administrator may manage the details of an existing outcome plan or create a new one.

#### Outcome Plan Details

Table 4: Outcome Plan Type Configuration

Outcome Plan Type Configuration

Plan element	Setting
Name	Child Welfare Outcome Plan
Reference	Blank
Home Page	Blank
Goals Applicable To	Outcome Plan and Clients
Agreement Approval Check	0%
Ownership Strategy	Blank
Description	The Child Welfare Outcome Plan focuses on child welfare activities.
MDT	
Type	Ad Hoc

Plan element	Setting
Sharing Enabled	Yes
Portal Home Page	Blank
User Creation Options	
Create Actions	Yes
Create Objectives	Yes
Create Factors	Yes
Review Options	
First Review	30
Frequency Calculation	Previous Review Date
Frequency	60

## Goals

For the goals to be configured for child welfare:

- The Reference value will always be blank

*Table 5: Configured Outcome Management Goals*

Name	Description
Maintain at Home	To maintain children in their home.
Return Home	To reunify a child who has been removed from their home with their parent or caretaker.
Kith/Kin Care	To find the most appropriate relative or community placement for the child.
Adoption	To facilitate the adoption of the child.
Emancipation	To assist the child in achieving self-sufficiency to emancipation.
Guardianship	To facilitate the guardianship of the child by some other adult.

## Objectives

For the objectives to be configured for child welfare:

- The Reference value will always be blank

*Table 6: Configured Outcome Management Objectives*

Name	Description
Provide youth specific supportive activities to enhance his or her psychological, social and educational needs	These could include voluntary and paid services, such as mentoring, tutoring and after school sports activities. The purpose of these activities is to maintain the proper nurturing environment for a child under the auspices of the organization.
Provide services to meet unique accessibility requirements of the client or family member	Interpretation service (such as translation and sign language) requests and other accessibility requests can be captured via this objective.



Name	Description
Provide therapeutic services that meet the child or family members psychological needs	As many, if not all, children under the auspices of the organization require some sort of therapeutic services (as do many of the parents), this objective is intended to capture plan items (or services) to address these needs, like art therapy, psychiatric counseling, etc.
Provide temporary child care services to help the family overcome a barrier towards self-sufficiency	This objective identifies situations where the parents (foster or biological) require some assistance to overcome a barrier and achieve permanency for the child – specifically temporary or long-term day care services. Some scenarios where this would be recommended would include job interviews, emergency respite care, etc.
Provide evaluative services to assess the needs of the identified person	This objective is intended to better understand the needs and requirements of the client and his/her family via third party evaluations of the person in question to identify their needs to achieve permanency.
Provide assistance for the mother and children who have been victims of domestic violence	In situations where the child is coming into focus due to situations of domestic violence, this objective presents the user with activities/services that would be specific to families dealing with issues of domestic violence.
Provide activities and/or services to meet the educational needs of an identified person	This objective focuses on activities and services specifically related to the educational needs of a participant in the case.
Provide education and support in the maintenance of the home environment	This objective addresses issues associated with basic home management activities, such as cleaning the home, budgeting, etc. These services assist the client in achieving independent living skills.
Provide supportive services and assistance in the preparation of a youth preparing to enter adulthood	This objective focuses on activities and services geared towards preparing a child for independence.
Provide appropriate medical services for the identified person	This objective focuses on medical related activities, such as physical exams.
Address any accessibility issues for a person with a disability	This objective addresses accessibility issues or barriers specific to persons with disabilities, such as providing handicap accessible facilities.
Address issues of substance abuse and addiction	This objective focuses on treatment for substance addiction.

## Actions

For the actions to be configured for child welfare:

- The Reference value will always be blank
- The Cost Model value will always be No Cost
- The Fixed Cost value will always be None
- The Multiple Clients value will always be No
- The Client Participation value will always be No
- The Responsibility value will always be Client
- The Owner value will always be Client
- The Create SID value will always be blank
- The Modify SID value will always be blank
- The Exclude from Availability Check value will always be Yes

Table 7: Configured Outcome Management Actions

Name	Description
Mentorship	Mentoring services for the client (e.g. Big Brothers & Big Sisters of America) assist the client in developmental, educational and social issues.
After School Program	After school programs provided by schools or community agencies that provide educational, developmental and social activities.
Recreational Services	Recreational services provide physical and developmental activities
Disabled Access	The case worker will address any accessibility issues for a disabled child.
Support Group	Services provided to help an individual find and participate in support groups and learn techniques to become more self-reliant.
Community College	Adult education classes at community college.
Community Services	Services related to education available in the community and outreach services to provide information relating to education to families.
High School Equivalency Test	Certification for individuals who have not been able to complete high school that they have passed an equivalency test.
Pre-Natal Classes	Services to pregnant mothers and their families regarding prenatal care, and what to expect when you are expecting.
Budgeting Training	Financial planning training and services for individuals.
Nutritional Education	Information and educational materials on how to improve diets and lives.
Education Plan	An individualized education plan for school children with special needs that identify a child's unique needs.
Tutoring	After school services provided by a tutor to a child to focus on educational needs and improve child's learning.

## Factors

Factors will only be configured for the outcome plan. With regards to the factors to be configured for child welfare:

- The Start Date value will always be April 1, 2011
- The End Date value will always be blank
- The Reference value will always be blank
- The Rating Interval value will always be 30 days

Table 8: Configured Outcome Management Factors

Name	Type	Description
Substance Abuse	Need	This factor identifies whether the client has a substance abuse problem.
Parenting Skills	Barrier	This factor identifies whether the caregiver's parenting skills are a strength or an issue.
Child's Functioning	Need	This factor identifies whether the child's medical or psychological health is a strength or an issue.

## Recommended Actions

The following recommended actions will be available for the outcome plan. For the recommended actions to be configured for child welfare:

- The Programs value will never be selected.
- The Recommendation value will always be blank.

Table 9: Configured Recommended Actions for Outcome Plan

Action	Reason
Mentorship	Mentoring services for the client (e.g. Big Brothers & Big Sisters of America) assist the client in developmental, educational and social issues.
After School Program	After school programs provided by schools or community agencies that provide educational, developmental and social activities.
Recreational Services	Recreational services provide physical and developmental activities
Disabled Access	The case worker will address any accessibility issues for a disabled child.
Support Group	Services provided to help an individual find and participate in support groups and learn techniques to become more self-reliant.
Community College	Adult education classes at community college.
Community Services	Services related to education available in the community and outreach services to provide information relating to education to families.
High School Equivalency Test	Certification for individuals who have not been able to complete high school that they have passed an equivalency test.
Pre-Natal Classes	Services to pregnant mothers and their families regarding prenatal care, and what to expect when you are expecting.
Budgeting Training	Financial planning training and services for individuals.
Nutritional Education	Information and educational materials on how to improve diets and lives.
Education Plan	An individualized education plan for school children with special needs that identify a child's unique needs.
Tutoring	After school services provided by a tutor to a child to focus on educational needs and improve child's learning.

## Case Types

The configured outcome plans will be set to be available from the Adoption and the Ongoing integrated cases.

## 1.5 Backward Compatibility

Child Services and Youth Services were originally available in Cúram v5.0 and Cúram V5.2. At the time, the solutions heavily leveraged available features in Cúram Services Plans. Cúram

Family Services Suite v5.0 also introduced Case Plan, Case Review and other Family Service specific features.

In v6, Service Plans, Case Plans, Case Reviews and other features have been replaced with new functionality implemented in V6 (e.g. Outcome Management). The v5.0 and V5.2 features will be available solely for the purpose of backward compatibility – to support projects that prefer to continue to use the originally available features for Service Plans, Case Plans and Case Reviews.

## Service Plan Components

This section defines the service plan demonstration data included as part of the Suite. The intent of this data is to provide a base line of service plan specific details to expedite the implementation of a solution.

### Service Plan Goals

Table 10: List of Service Plan Goals

Name	Description	CCS	CYS
Family Services	To maintain children in their home.	Yes	No
Return Home	To reunify a child who has been removed from his/her home with parent(s) or caretaker(s).	Yes	No
Kith/Kin Care	To find the most appropriate relative or community placement for the child.	Yes	No
Adoption	To facilitate the adoption of the child.	Yes	No
Emancipation	To assist the child in achieving self-sufficiency to emancipation.	Yes	No
Guardianship	To facility the guardianship of the child by some other adult.	Yes	No
Prevention of Delinquency	To prevent delinquent behavior by at risk participant.	No	Yes
Maintain Participant in Community	To maintain participant in community with law abiding behavior.	No	Yes
Re-Entry into Community	To return participant to community/family following facility placement/commitment and/or treatment.	No	Yes

### Service Plan Sub-Goals

Table 11: List of Service Plan Sub-Goals

Name	Description	CCS	CYS
Accessibility	This sub-goal addresses accessibility issues or barriers specific to persons with disabilities, such as providing handicap accessible facilities or interpretation services.	Yes	Yes
Alternative Child Care	The desire of this sub-goal is to identify situations where the parents (foster or biological) require some assistance to overcome a barrier and achieve permanency for the child - specifically temporary or long-term day care services. Some scenarios where this would be recommended would include job interviews, emergency respite care, etc.	Yes	No

Name	Description	CCS	CYS
Child and Adolescent Activities	These could include voluntary and paid services, such as mentoring, tutoring and after school sports activities. The purpose of these activities is to maintain the proper nurturing environment for a child under the auspices of the organization.	Yes	Yes
Counseling/ Therapy	As many, if not all, participant under the auspices of the organization require some sort of therapeutic services (as do many of the parents), this sub-goal is intended to capture plan items (or services) to address these needs, like art therapy, psychiatric counseling, etc.	Yes	Yes
Diagnostic Services	To better understand the needs and requirements of the child and his/her family, this sub-goal allows the user to request third party evaluations of the person in question to identify their needs to achieve goals.	Yes	Yes
Domestic Violence	In situations where the child is coming into focus due to situations of domestic violence, this sub-goal presents the user with activities/services that would be specific to families dealing with issues of domestic violence.	Yes	No
Education	This sub-goal focuses on activities and services specifically related to the educational needs of a participant in the case.	Yes	Yes
Employment and Training	This could include finding a job, maintaining job, employment training.	No	Yes
Family Support	This could include family counseling, support groups, visitation supports.	No	Yes
Gang or Peer Group Intervention Services	This could include support groups; specialized treatment and re-education skills training.	No	Yes
Home Management Services	This sub-goal addresses issues associated with basic home management activities, such as cleaning the home, budgeting, etc.	Yes	No
Independent Living	This sub-goal focuses on activities, life skills education, and services geared towards preparing a participant for independence.	Yes	Yes
Medical Care	This sub-goal focuses on medical related activities, such as physical exams.	Yes	Yes
School Participation	This could include regular attendance at school in community; in facility; in vocational training, alternative schools, or other education program.	No	Yes
Sex Offender Treatment	Includes individual and specialized therapy which could be court ordered or determined as needed through evaluation process.	No	Yes
Substance Abuse	This sub-goal focuses on treatment for substance addiction, abuse, or use.	Yes	Yes
Victim Related Services	This includes Victim/Offender mediation. Other victim specific activities are managed via the case.	No	Yes

## Service Plan Outcomes

Table 12: List of Service Plan Outcomes

Name	Description	CCS	CYS
Academic/Educational competence improved	Participant has attained improvement in educational competence.	Yes	No

Name	Description	CCS	CYS
Accessibility needs are being met	Accessibility issues due to disabilities are being addressed.	Yes	Yes
Alternative child care services provided	Child care services (e.g. day care) are being provided for the participant.	No	Yes
Appropriate treatment services were provided	Participant has received appropriate residential or specialized treatment as needed.	Yes	No
Communication needs are being met	Exceptional communication needs (e.g. sign language & translation) are being met.	Yes	Yes
Complied with treatment services	The participant is complying with the treatment service (e.g. counseling) as directed by the plan item.	Yes	Yes
Decreased likelihood of abuse	The service identified by the plan item has noticeably decreased the risk factors associated with the abuse.	Yes	No
Diagnostic services completed	Diagnostic evaluations and/or assessments has been completed but not submitted by the agency responsible for conducting the evaluation.	Yes	Yes
Diagnostic services report submitted	Diagnostic evaluations and/or assessments have been submitted by the agency responsible for conducting the evaluation.	No	Yes
Education needs identified	Education needs have been identified for a participant (e.g. via an Individualized Education Plan).	Yes	Yes
Education plan in place	An individualized education plan has been created for the participant based on the unique needs of the participant.	Yes	Yes
Educational needs are being met	The plan item has addressed or is addressing the educational needs of the participant for whom the plan item has been created.	Yes	Yes
Employment is attained and/or maintained	Participant has successfully attained employment, completed employment training, or maintained employment.	Yes	No
Followed through on referral	The participant followed through on a referral as part of the service plan, and is currently actively engaged in the activity.	Yes	Yes
Improved family functioning	The service identified by the plan item has improved the family's functioning, including (but not limited to) communication skills and coping skills.	Yes	Yes
Improved individual functioning	The service identified by the plan item has improved the individual client's functioning, including (but not limited to) communication skills and coping skills.	Yes	No
Increased coping skills	The service identified by the plan item as improved the coping skills of the participant receiving treatment.	Yes	Yes
Psychological needs are being met	The plan item has addressed or is addressing the psychological needs of the participant for whom the plan item has been created.	Yes	Yes
Reduce substance abuse	The service identified by the plan item has reduced the participant's substance dependency.	Yes	Yes
Referral made	A referral to an external provider was successfully made for the participant.	Yes	Yes
Safety issues addressed	The safety issues that predicated the assignment of the plan item have been addressed.	No	Yes

Name	Description	CCS	CYS
School participation has increased	Participant has attended education classes as prescribed by service plan or education plan.	Yes	No
Social needs are being met	The plan item has addressed or is addressing the social needs of the participant for whom the plan item has been created.	Yes	Yes
Stable home environment	The completed plan item has resulted in the creation of a safe and stable home environment for the participant.	Yes	Yes

## Plan Items

### Service Plan Item

This section will list the Service plan items and their associated Sub-Goal. All service plan items will be associated with a SERVICE, which is dependent on CPM.

Table 13: List of Service Based Plan Items

Sub-Goal	Service Plan Item Name	Description	CCS	CYS
Accessibility	Sign Language Services	Interpretive services, where an interpreter facilitates communication between a deaf or hard of hearing individual and a hearing individual.	Yes	Yes
Accessibility	Translation Services	Interpretive services, where an interpreter facilitates communication between an individual who does not speak the language of the other individual.	Yes	Yes
Alternative Child Care	Long Term Child Care	Day care services provided to the caretaker of the child for an extended period of time to address issues such as employment, training, etc.	Yes	No
Alternative Child Care	Short Term Child Care	Temporary day care services to meet immediate needs (e.g. to prevent removal from a home, to go on a job interview, etc).	Yes	No
Alternative Child Care	Respite Care	Extended day placement outside of the foster home to provide respite to the foster parents. Funding for respite care is separate from the Foster Care board rate and will not impact the regularly scheduled foster care compensation.	Yes	No
Child and Adolescent Activities	Day Camp	Paid summer program to provide child care and educational, social & developmental activities.	Yes	No
Child and Adolescent Activities	Day Treatment Program	Paid program to provide educational, social & developmental activities.	No	Yes
Counseling and Therapy	Abuse (Maltreater)	Counseling services focused on alleviating identified problems that may cause or have caused a child to be abused or neglected.	Yes	Yes
Counseling and Therapy	Abuse (Victim)	Counseling services provided to correct or alleviate any mental or emotional illness or disorder that might be associated with abuse towards the child.	Yes	Yes
Counseling and Therapy	Anger Management	Specialized counseling services focused on anger management.	Yes	Yes
Counseling and Therapy	Parenting	Counseling or classes to help parents improve parenting skills and address problems/issues.	Yes	Yes
Counseling and Therapy	Stress Management	Services designed to help an individual to identify and cope with stress such as environmental stress, daily stress events, life changes and family/work stress.	Yes	Yes
Counseling and Therapy	Family Counseling	Services provided to family of participant to improve family interaction.	Yes	Yes
Counseling and Therapy	Therapeutic Counseling	Therapy sessions to nurture change and improvement of family or individual problems.	Yes	Yes

Sub-Goal	Service Plan Item Name	Description	CCS	CYS
Diagnostic Services	Psychiatric	Psychiatric evaluation of participant's needs.	Yes	Yes
Diagnostic Services	Psychological	Psychological evaluation of participant's needs.	Yes	Yes
Diagnostic Services	Batterer Assessment	Assessment of batterer to determine likelihood of re-offense.	Yes	Yes
Diagnostic Services	Child Development	Determine developmental issues or areas in need of strengthened for children.	Yes	Yes
Diagnostic Services	Alcohol Abuse Assessment	Evaluation/Assessment of Alcohol abuse.	Yes	Yes
Diagnostic Services	Drug Abuse Assessment	Evaluation/Assessment of drug abuse.	Yes	Yes
Diagnostic Services	Life Skill Assessment Services	Assessment by an external agency of child's skills and ability to live independently.	Yes	Yes
Diagnostic Services	Educational	Evaluation of educational needs and diagnosis of any learning disabilities/disorders.	Yes	Yes
Diagnostic Services	Dental	Dental screening	Yes	Yes
Diagnostic Services	Hearing	Hearing tests/evaluations to measure hearing functions.	Yes	Yes
Diagnostic Services	Medical	Various medical tests and assessment to evaluate health of individuals and diagnosis of potential health related issues.	Yes	Yes
Diagnostic Services	Vision	Vision test and diagnosis of vision problems.	Yes	Yes
Education	Literacy Program	Service focused on improving reading skills of participant.	Yes	Yes
Gang or Peer Group Intervention Services	Gang Intervention/ Treatment Curriculum	Specialized treatment for participant focused on reformative treatment aimed at gang affected participant who intend to change their lives.	Yes	Yes
Home Management Services	Environmental Management	Services to help families address environmental issues in the home and make the home safer, cleaner and healthier.	Yes	No
Home Management Services	Homemaker Services	Homemaker services help families care for their family and homes.	Yes	No
Independent Living	Life Skill Assessment Services	Assessment by an external agency of child's skills and ability to live independently.	Yes	Yes
Independent Living	Independent Living Skills Services	Children receive training and support to obtain independent living skills from an external agency.	No	Yes
Sex Offender Treatment	Specialized Sex Offender Treatment	Specialized treatment for participant who is determined to be sex offender. Can include individual and specialized therapy court ordered or determined as needed through evaluation process.	Yes	Yes
Substance Abuse	Alcohol Abuse Treatment-Inpatient	Inpatient treatment for alcohol addiction.	Yes	Yes
Substance Abuse	Alcohol Abuse Treatment-Outpatient	Outpatient treatment for alcohol addiction.	Yes	Yes
Substance Abuse	Drug Abuse Treatment - Inpatient	Inpatient treatment for drug abuse.	Yes	Yes
Substance Abuse	Drug Abuse Treatment - Outpatient	Outpatient treatment for drug addiction.	Yes	Yes



Sub-Goal	Service Plan Item Name	Description	CCS	CYS
Substance Abuse	Alcohol Abuse Assessment/Evaluation	Evaluation/Assessment of Alcohol abuse.	Yes	Yes
Substance Abuse	Drug Abuse Assessment/Evaluation	Evaluation/Assessment of drug abuse.	Yes	Yes

### Basic Plan Item

This section will include the configuration details for basic plan items and their associated Sub-Goal.

Table 14: List of Basic Plan Items

Sub-Goal	Basic Plan Item Name	Description	CCS	CYS
Accessibility	Disabled Access	The case worker will address any accessibility issues for a disabled child.	Yes	Yes
Child & Adolescent Activities	Mentorship	Mentoring services for children (e.g. Big Brothers & Big Sisters of America) assist child in developmental, educational and social issues.	Yes	No
Child & Adolescent Activities	After School Program	After school programs provided by schools or community agencies that provide educational, developmental and social activities.	Yes	No
Child & Adolescent Activities	Recreational Services	Recreational services provide physical and developmental activities.	Yes	No
Counseling & Therapy	Support Group	Services provided to help an individual find and participate in culturally sensitive support groups and learn techniques to become more self-reliant.	Yes	No
Education	Community College	Adult education classes at community college.	Yes	Yes
Education	Community Services	Services related to education available in the community and outreach services to provide information relating to education to families.	Yes	Yes
Education	High School Equivalency Test	Certification for individuals who have not been able to complete high school that they have passed an equivalency test.	Yes	Yes
Education	Pre-Natal Classes	Services to pregnant mothers and their families regarding prenatal care, and what to expect when you are expecting.	Yes	Yes
Education	Budgeting Training	Financial planning training and services for individuals.	Yes	Yes
Education	Nutritional Education	Information and educational materials on how to improve diets and lives.	Yes	Yes
Education	IEP (Individual Education Plan)	An individualized Education plan for school children with special needs that identify a child's unique needs.	Yes	Yes
Education	Vocational Training	Job skill training and services for participant.	Yes	Yes
Education	Alternative School	Specialized controlled school program in community setting.	No	Yes
Education	Facility Education classes	Regular education classes provided at juvenile facility.	No	Yes
Education	Tutoring	After school services provided by a tutor to a child to focus on educational needs and improve child's learning.	Yes	Yes
Employment & Training	Find a Job/Maintain a job	Individual participant sub-goal to find and maintain employment.	No	Yes
Employment & Training	Employment training	This could include employment or skills training to secure job.	No	Yes

Sub-Goal	Basic Plan Item Name	Description	CCS	CYS
Medical Care	Medical Treatment	Provision of medical treatment including medications, surgery, hospitalization, etc.	Yes	No
Substance Abuse	Support Group	Services provided to help an individual find and participate in support groups and learn techniques to become more self-reliant.	Yes	Yes
Victim Related Services	Victim/Offender Mediation	This could include Victim/Offender mediation to provide reconciliation and communication between participant and victim.	No	Yes

## Next Case Review Date

A Case Review is a re-examination of case components to evaluate the progress towards an agreed outcome and to determine next steps. On completion of a Case Review the system determines the Next Review Due Date based on administrative configuration. CFSS provides the ability to configure the number of days between Case Reviews.

**Note:** Outcome Management in V6 will provide support for this configuration at the outcome plan level.

### How

Access the property administration area of the application. Select the following application property to manage the admission process configuration setting for the organization:

curam.cfss.caseReview.nextDueDate

This property is maintained in the Family Services Configuration – CFSSCommon category.

### Outcome

The Next Case Review Due Date will be determined based on number of days configured and the current case review completion date.

## Investigation Recommendation Approval Settings

Recommendations submitted in investigation cases in Child Services require approval processing. Child Services supports the ability to define the approval process to be employed by the organization depending upon the organization's business requirements. The percentage of investigation recommendations requiring supervisor approval can be set by the administrator. For example, an approval check percentage set to 30 signifies that 3 out of 10 investigation recommendations will be sent to the supervisor for approval.

**Note:** Cúram Investigations in V5.2 is fully supported by platform and will no longer utilize the Family Services specific management capabilities as implemented in V5.0. This feature will only be used to support backward compatibility with free-standing services.

### How

Access the Family Services administration area of the application to navigate to the investigation configuration details. From here, the administrator may manage approval check settings for the configured investigations.

## Outcome

Investigation recommendations requiring supervisory approval will be determined based on the settings defined in the investigation configuration setting.

## 1.6 CCS Organization Structure

Use the Child Services (CCS) organization structure provides to manage the CCS organization's users. In the organizational structure that is defined by CCS, each organization includes one or more positions. The organization unit is the parent element to any positions contained within it.

Table 15: CCS Organization Units (OU)

Organization Unit	Description
CCS Intake	The Intake Organization Unit (OU) is responsible for receipt of referrals and intakes from the community or mandated reporters regarding children at risk of harm, being harmed or in need of other services.
CCS Investigation	The Investigation OU is responsible for investigations or follow up activities based on referrals received by the CCS Intake OU.
CCS Ongoing	The Ongoing OU manages the operational and logistic activities associated with children who are being looked after by the agency.
CCS Adoption	The Adoption OU comes into the picture when a child is in care and when it is not feasible to return the child back to the child's original home.

## Organization Unit: CCS Intake - Positions

Table 16: CCS Intake OU Positions

Position	Position Description	Supervisor	Subordinate	Lead	Job
CCS SDM Intake Super	Immediate supervisor of the SDM Intake worker. They conduct supervisory activities related to an intake. This position has access to view full case history and details as well as approve/ reject/ cancel an intake.		CCS SDM Intake worker	Yes	Supervisor
CCS Intake Supervisor	Immediate supervisor of the Intake Worker. This position has access to view full case history and details as well as approve/reject/ cancel an intake.		CCS Intake Worker	Yes	Supervisor

Position	Position Description	Supervisor	Subordinate	Lead	Job
CCS SDM Intake Worker	This position has the access to create an intake at the initial level. They conduct all intake level activities in CCS. They capture the information from the reporter and feed it into the system.	CCS SDM Intake Super		No	Intake
CCS Intake Worker	This position has the access to create an intake at the initial level. They capture the information from the reporter and feed it into the system	CCS Intake Supervisor		No	Intake

## Organization Unit: CCS Investigation - Positions

Table 17: CCS Investigation OU Positions

Position	Position Description	Supervisor	Subordinate	Lead	Job
CCS SDM Investigation Super	Immediate supervisor of the SDM Investigator. They conduct all supervisory activities in investigation. This position has access to view the complete details of any case that is being assigned to an SDM investigation Supervisor. CCS SDM Investigation Supervisor has also the access to approve, reject or cancel any case request that's come from the Investigator.		CCS SDM Investigator	Yes	Supervisor

Position	Position Description	Supervisor	Subordinate	Lead	Job
CCS Investigation Supervisor	Immediate supervisor of an Investigator. This position has access to view the complete details of any case that is being assigned to an investigation Supervisor. CCS Investigation Supervisor has also the access to approve, reject or cancel any case request that's come from the Investigator.		CCS Investigator	Yes	Supervisor
CCS SDM Investigator	They conduct all investigation level activities in CCS. This position has access to assess the safety of the child; makes contact with the participants, dispose allegations and determine the risk factors related to future harm to the child.	CCS SDM Investigation Super		No	Investigator
CCS Investigator	They conduct all investigation level activities in CCS. This position has access to assess the safety of the child, makes contact with the participants, dispose allegations and determine the risk factors related to future harm to the child	CCS Investigation Supervisor		No	Investigator

## Organization Unit: CCS Ongoing- Positions

Table 18: CCS Ongoing OU Positions

Position	Position Description	Supervisor	Subordinate	Lead	Job
CCS SDM Case Super	Immediate supervisor of the child welfare sdm caseworker		CCS SDM Caseworker	Yes	Supervisor
CCS Ongoing Supervisor	Immediate supervisor of the child welfare caseworker		CCS Ongoing Worker	Yes	Supervisor

Position	Position Description	Supervisor	Subordinate	Lead	Job
CCS SDM Caseworker	This position holds access to contact management, IV-E eligibility, legal actions and capturing and maintaining in-depth child and family information, develop, manage and monitor an outcome plan and visitation plan and managing services and placements.	CCS SDM Case Super		No	Caseworker
CCS Ongoing Worker	This position holds access to contact management, IV-E eligibility, legal actions and capturing and maintaining in-depth child and family information, develop, manage and monitor an outcome plan and visitation plan and managing services and placements.	CCS Ongoing Supervisor		No	Caseworker

## Organization Unit: CCS Adoption - Positions

Table 19: CCS Adoption OU Positions

Position	Position Description	Supervisor	Subordinate	Lead	Job
CCS Adoption Supervisor	Immediate supervisor of the CCS adoption worker.		CCS Adoption Worker	Yes	Supervisor
CCS Adoption Worker	This position has access to adoption cases. CCS Adoption worker initiates as well as manages an adoption case and takes steps to move the case towards adoption finalization.	CCS Adoption Supervisor		No	Caseworker

## 1.7 Configurable Validations

Cúram provides the ability, as part of its framework, to define business validations as configurable validations so that customers can disable them based on their business requirements.

This section lists the business validations implemented as configurable in various solutions of CFSS.

## Child Services

Message	Component
If a From Date is entered, a To Date must be entered.	Case Search
This milestone cannot be modified as the case to which the milestone is linked is already closed.	Milestone Delivery
Requested Date,%1s must not be earlier than Case Creation Date,%2s	Inter Jurisdiction
Requested Date,%1s must not be earlier than Participant Birth date,%2s	Inter Jurisdiction
The latest Safety Assessment Outcome must be 'Safe' to recommend closure on the case.	SDM Assessments

## 1.8 System Administrator

System administrator functions include rate tables, property administration settings, milestones, and batch processes.

## Rate Tables

Rates are values that can vary over time. Rate tables are used to maintain these rates. Since rate tables can be created and maintained independently, this allows for a more flexible approach to rates that apply to products. Rate tables can be used for values that are effective during set time periods. This section will present the different rate tables being utilized in CFSS.

Table 20: List of Rate Tables implemented in CFSS

Name	Description	CCS	CYS
Maturity age	Age at which the participant is no longer considered a child or eligible for child welfare services.	Yes	No
IV-E expenses	Title IV-E (US) related evidence rate tables.	Yes	No
IV-E attributes	Title IV-E (US) related evidence rate tables.	Yes	No
IV-E standard need	Title IV-E (US) related evidence rate tables.	Yes	No
IV-E liquid resources	Title IV-E (US) related evidence rate tables.	Yes	No
IV-E properties	Title IV-E (US) related evidence rate tables.	Yes	No
IV-E vehicle	Title IV-E (US) related evidence rate tables.	Yes	No
IV-E earned income	Title IV-E (US) related evidence rate tables.	Yes	No

Name	Description	CCS	CYS
IV-E unearned income	Title IV-E (US) related evidence rate tables.	Yes	No
IV-E self-employment	Title IV-E (US) related evidence rate tables.	Yes	No
Youth Services Attributes	Rate table for Youth Services attributes, such as maximum age for youth.	No	Yes

## Property Administration Settings

This section describes the configurable property files implemented as part of Cúram Family Services Suite (CFSS) and its solutions, Child Services (CCS) and Youth Services (CYS).

Table 21: List of Application Properties

Name	Description	CCS	CYS
ccs.release	Defines the welcome message, which can include the CCS version that is being released to the organization.	Yes	No
curam.casevisitor.add.as.caseparticipant	Environmental property that determines whether the case visitor is added as case participant or not.	No	Yes
curam.casevisitor.include.primaryclient	Environmental property that determines whether the primary client of a youth service case can be added as a visitor in their own visitation plan.	No	Yes
curam.ccs.fostercare.placement.priordays.toe	Defines the number of days prior that the end date of a placement occurs (0 or 1) on a previous placement.	Yes	No
curam.ccs.intake.displayapprovedcases.disabled	Indicates whether the display of approved intake cases is disabled on the caseworker's home page.	Yes	No
curam.ccs.intake.performance.timeframe	Defines the number of hours that an intake approval takes.	Yes	No
curam.ccs.investigation.milestone.configid	Defines the administration configuration ID of the investigation against which a milestone is configured.	Yes	No
curam.cfss.agendaplayerconfiguration.organis	Defines whether the organization's admission validation settings apply to all facilities.	No	Yes
curam.cfss.attachment.description.maxlength	Defines the maximum length allowed for an attachment description on the list page.	Yes	Yes
curam.cfss.ccs.afcars.fostercare.filelocation	Defines the location where a generated AFCARS report is stored.	Yes	No
curam.cfss.ccs.fostercare.placement.approver	Defines whether permission (approval or rejection) is required to complete the placement of a participant in out-of-home care.	Yes	No
curam.cfss.ccs.fostercare.removal.daysincare	Defines whether the days in care since the last active removal or the accumulated days in care for all removals are to be shown in the child services case.	Yes	No
curam.cfss.caseReview.nextDueDate	Defines the number of days between case reviews.	Yes	Yes
curam.cfss.casesearch.excludedcasetypes	Defines the Cúram case types not to be included when a case search is conducted in CFSS.	Yes	Yes



Name	Description	CCS	CYS
curam.cfss.incomesupport.installed	Indicates whether Cúram Global Income Support Services Suite is installed with CFSS.	Yes	Yes
curam.cfss.integratedCase.multipleOnGoingAll	Indicates whether multiple ongoing cases are allowed for any child services case (for instance, intake or investigation).	Yes	No
curam.cfss.participantsearch.excludedconcern	Defines the Cúram concern roles not to be included when a participant search is undertaken in CFSS.	Yes	Yes
curam.cfss.physicaldescription.heightUnit	Defines the unit of measure to be presented when height details are captured for a person.	Yes	Yes
curam.cfss.physicaldescription.weightUnit	Defines the unit of measure to be presented when height details are captured for a person.	Yes	Yes
curam.cfss.provider.proximity.unit	Defines the unit of measure to displaying when the distance to a provider is shown. Valid values are KM and MILES.	Yes	Yes
curam.cfss.service.approval.task.deadline	Defines the service approval task deadline configuration.	No	Yes
curam.cfss.workflow.casereview	Defines the deadline duration for the task sent regarding a case review.	No	Yes
curam.cys.integratedcase.allow.multiple	The environmental property that determines whether the system allows a user to create a single or multiple youth service case or cases.	No	Yes
curam.cys.integratedcase.enforce.age.validat	Enforces the age validation on the Youth Service case creation process.	No	Yes
curam.cys.integratedcase.full.medicalexam.de	Defines the number of hours allowed between an initial health evaluation and full medical examination.	No	Yes
curam.cys.integratedcase.medicalexam.duedate	Defines the number of hours that are left for full a medical examination to be completed upon initiation.	No	Yes
curam.cys.integratedcase.full.phonenotificat	Defines the default number of hours to apply as the deadline for phone notification task.	No	Yes
curam.cys.temporaryrelease.hour.limit	Defines the default Return Date/Time setting to present when a Temporary Release is created.	No	Yes
curam.cys.temporaryrelease.limit	Defines the number of days of Scheduled Temporary Release to display in the list.	No	Yes
curam.facility.securitysearch	Defines the default time frame to display in the Security Search View.	No	Yes
curam.roomassignment.assignroom.task	Defines the number of hours that need to pass before a task is sent a to facility worker to assign a new room to a youth who is being admitted to a facility.	No	Yes
curam.ccs.investigation.recommendation.dueda	Defines the due date of the investigation recommendation based on the investigation start date.	Yes	No
curam.maintain.prior.placement	Defines whether the previous placement must be maintained when a new runaway placement record is created.	Yes	No
curam.prior.placement.offset	Defines the number of days a previous placement needs to be held when a child runs away from that placement.	Yes	No

Name	Description	CCS	CYS
curam.ccs.investigation.servicedelivery	Defines whether stand-alone services are available from a Child Services investigation.	Yes	No
curam.ccs.ci.intake	Defines whether common intake is enabled.	Yes	No
curam.ccs.maxRecord.size	Defines the maximum number of records to be displayed on CCS pods.	Yes	No
curam.ccs.intake.advisor.enabled	Defines whether the smart panel needs to include the intake advisor.	Yes	No
	<b>Note:</b> This application property currently is not in use.		
curam.ccs.socialrelationship.enabled	Defines whether social relationship details (for instance, strength of a relationship between two individuals) can be captured.	Yes	No
curam.cfss.iveeligibility.enabled	Defines whether IV-E eligibility is enabled.	Yes	No
	<b>Note:</b> This application property currently is not in use.		
curam.cfss.admissionvalidationsetting.organizationalunit	Defines whether validation for Admissions process was enabled.	No	Yes
curam.cfss.ccs.common.search.max.records.returned	Defines the number of records returned for CFSS-specific search processes.	Yes	Yes
curam.cfss.ccs.common.plan.indicator	Defines whether the <b>Plan</b> page group needs to be enabled to present the case plan functions implemented in previous versions of CCS.	No	Yes
curam.lucene.luceneParticipantSearchEnabled	Defines whether Lucien-enhanced participant search functions are enabled for the CCS All Participant Role search.	Yes	Yes
	<b>Note:</b> This application property currently is not in use.		
curam.cfss.premodify.version.update	Defines whether <del>versionNo</del> has to be considered prior to modification of a record.	Yes	Yes
curam.batch.createcontactcompliance.chunksize	Defines the chunk size to be processed in the Create Contact Compliance batch process.	Yes	Yes
curam.batch.createcontactcompliance.dontrunsleep	Defines whether the Create Contact Compliance batch process needs to sleep while it is waiting for other batch processes to complete.	Yes	Yes
curam.batch.createcontactcompliance.chunkkey	Defines how long the Create Contact Compliance batch process chunks need to sleep while it is waiting for other batch processes to complete.	Yes	Yes
curam.batch.createcontactcompliance.unprocessedwait	Defines the interval in milliseconds that the Create Contact Compliance batch process waits before it attempts to read the chunk table again.	Yes	Yes
curam.batch.createcontactcompliance.processunprocessed	Defines whether the Create Contact Compliance batch process needs to process any unprocessed chunks that are found after all the streams are completed.	Yes	Yes

Name	Description	CCS	CYS
curam.cfss.cys.common.plan.indicator	Defines whether the <b>Plan</b> page group needs to be enabled to present the case plan functions implemented in previous versions of CYS.	No	Yes
curam.cfss.ccs.common.intakeNarrative	This property defines how long (in minutes) before the intake narrative in the smart panel is saved automatically. If the value is set to zero, the auto save feature is disabled.	Yes	No
curam.ccs.PDFCreation.enabled	This property determines whether the closure of an ongoing case results in the creation of a communication. The XML server must be up and running if this property is enabled.	Yes	No
curam.cfss.ccsIntake.participantMerge	This property determines whether the concernRoleID of a prospect person that was merged with a registered person needs to be updated to have a registered person displayed as case participant instead of the prospect person in an intake.	Yes	No
curam.cfss.ccsInvestigation.participantMerge	This property determines whether the concernRoleID of a prospect person that was merged with a registered person needs to be updated to have a registered person displayed as case participant instead of the prospect person in an investigation.	Yes	No
curam.cfss.ccsIntegrated.participantMerge	This property determines whether the concernRoleID of a prospect person that was merged with a registered person needs to be updated to have a registered person displayed as case participant instead of the prospect person in an Integrated Case.	Yes	No
curam.contactlog.subject.enabled	Enable Contact Log Subject defines whether the Subject field is enabled or disabled for contacts in the contact log. If you set the value to true, a Subject field is displayed on contact pages so that caseworkers can record a subject for contacts and search for contacts by subject.	Yes	No
curam.contactlog.narrative.edit.enabled	Enable Editable Contact Narrative in Contact Logs defines whether contact narrative editing is enabled or disabled. If you set the value to true, caseworkers can edit the narrative for contacts that they create or append to for a preconfigured time period. If you set the value to false, caseworkers cannot update the original narrative for a contact and can append a narrative update only.	Yes	No
curam.contactlog.narrative.edit.period.length	8030 Contact Narrative Editable Period Length defines the length of time in hours during which caseworkers can edit the narrative for contacts that they create or append to in the contact log. The number of hours must be a whole number greater than 0. When the time period expires, the caseworker can no longer edit the narrative and can append a new narrative to the contact only.	Yes	No

## Milestones

Milestones are significant events or tasks that are to be completed during the life cycle of a case. CFSS defines some milestones to be included as demonstrate data to be included as part of the Suite. The intent of this data is to provide a base line of milestones to expedite the implementation of a solution.

Please note that Cúram supports the ability to have a milestone managed by (created or completed) or result in Cúram events. The milestones defined here are available to the user to be inserted into a case manually, or can be configured to be managed by the system based on Cúram events.

*Table 22: List of Milestones*

Name	Description	CCS	CYS
Initiate investigation	Indicates when an initial contact must be completed with a member of the family or alleged victim based on organization policy and practice.	Yes	No
Complete investigation	Indicates when an investigation recommendation must be submitted for approval.	Yes	No
Complete safety assessment	Indicates when a safety assessment must be completed for the household being investigated based on organization policy and practice.	Yes	No
Complete risk assessment	Indicates when a risk assessment must be completed for the household being investigated based on organization policy and practice.	Yes	No
Initial medical exam	Indicates when an initial medical exam should be completed for the child or children in the case based on organization policy and practice.	Yes	No
Initial plan	Indicates when an initial case plan should be completed based on organization policy and practice.	Yes	No
Plan review/ evaluation	Indicates when a case plan should be reviewed or evaluated based on organization policy and practice.	Yes	No
Initial service plan	Indicates when an initial service plan should be completed based on organization policy and practice.	No	Yes
Youth referral	Indicates when a youth referral should be completed based on organization policy and practice.	No	Yes
Youth admission	Indicates when a youth admission should be completed based on organization policy and practice.	No	Yes

## Batch Processes

This section describes the batch processes implemented as part of CFSS and its solutions.

Table 23: List of Batch Processes

Name	Description	CCS	CYS
CCSAFCARSFosterCareReport	Automate Foster Care and Adoptions Reporting System -Foster Care (AFCARS-FC) Electronic Data Files (EDF) for the U.S. This extract is for children in foster care. The summary file serves as a header to the Foster Care portion of the AFCARS submission file which is the mandatory federal reporting requirement (Section 479 of the Social Security Act) for all children who are under the responsibility of the State IV-B/IV-E agency, and who are "in foster care."	Yes	No
CCSAFCARSAdoptionReport	AFCARS-Adoption EDF for children in who have been adopted in the reporting period. The summary file serves as a header to the Adoption portion of the AFCARS submission file which is the mandatory federal reporting requirement (Section 479 of the Social Security Act) for all children who were under the responsibility of the State IV-B/IV-E agency.	Yes	No
FacilityRelease	This batch process sends a task to the facility worker for all pending scheduled release.	No	Yes
Room Assignment	This batch process sends task to the facility worker to assign the room to youth if not assigned.	No	Yes
CreateContactCompliance	This batch process creates contact compliance records for integrated case participants in placement if no record exists for a future date.	Yes	Yes



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