IBM Cúram Social Program Management
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*Cúram Citizen Context Viewer Guide*

IBM

**Note**

Before using this information and the product it supports, read the information in "Notices" on page 4

# Contents

# Chapter 1. Cúram Citizen Context Viewer overview

The Citizen Context Viewer summarizes a wide-range of client information in a single view.

## Citizen Context Viewer business architecture

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

The Citizen Context Viewer (CCV) integrates with Cúram participants and cases. For more information, see Cúram Participant Guide and the Cúram Integrated Case Management.

The CCV also works with **Cúram Social Enterprise Collaboration** and **Cúram Outcome Management** components that include social enterprise folders, outcome plans, and multidisciplinary team members. For more information, see Cúram Social Enterprise Collaboration Guide and Cúram Outcome Management Guide.

## Holistic view of clients in a central location

The Citizen Context Viewer (CCV) helps agencies gain a more complete and accurate picture of families and individuals by providing a single point of entry for navigating to client information from all agencies that deliver services.

Through the CCV, agency caseworkers can easily see:

- Who else is dealing with the clients, which include multidisciplinary team members and social enterprise agencies.
- What benefits and services the clients are receiving.
- What contact clients had with social enterprise agencies and multidisciplinary team members.

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

The CCV provides a holistic view of a client, and a holistic view of each of the client's family members. CCV users can view client information for each family member in the same CCV or else users can open a new CCV for each family member. Both options make it easier for agencies to compare information across families.

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

# CCV Components

The Cúram Citizen Context Viewer (CCV) is a tree structure that opens in a pop-up window so that it can be used with the application. The CCV shows an image of the client (if available) and their personal details.

Each CCV component groups aspects of client information, such as a client's cases, client communities, family relationships, client interactions, and multidisciplinary teams who act on behalf of clients.

## Care and Protection component

The care and protection component displays a summary of a client's programs (such as food stamps, Temporary Assistance for Needy Families (TANF), unemployment insurance benefits, medical assistance). The information that is displayed for each program includes the program status, the primary client, if relevant, and the program reference number.

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

## Communities component

The communities component displays the communities of which the client is a member. The classification of a community depends on the case or benefit, for example:

- Food Stamps, the community, is the Food Stamps Household.
- Temporary Assistance for Needy Families (TANF), the community, is the TANF Household.

## Family component

The family component shows a client's relationships. The CCV view can be changed to display information for any family member.

## Dealings component

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

## Multidisciplinary Team component

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

# CCV customization

One of the benefits of the CCV is the ability to configure the CCV components dynamically as part of system administration. This configuration primarily determines the client information to be displayed. For example, you can display only cases with a specific status.

For more information, see Configuring the Citizen Context Viewer.

Support for the following customization is also provided:

- To change the client information that is displayed in the CCV.
- To add CCV components, such as an employment history or a financial history.
- To define the case communities.

# The Citizen Context Viewer

The CCV opens in its own window so it can be used with other information in the application. The CCV navigation is designed to complement an agency's business requirements. You can view other CCV clients or view more information about a specific client.

The CCV also opens by selecting an icon on the client's image in the application. While the CCV opens in its own browser, its session is linked to the CCV user's application login. Before the CCV opens, the system checks the CCV user's security settings and displays only client information that the user is authorized to view.

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

### Managing clients and cases with the CCV

A feature of the CCV is the ability to manage the clients for an outcome plan. The CCV client and family members can be dragged into a list of clients that make up the outcome plan.

## Viewing client information for family members

The CCV allows users to view client information for family members by changing the existing CCV client or by opening a new CCV for each family member.

To see information about a family member on their CCV, the CCV user can drag family members on to first panel of the CCV. The CCV panel and the tree structure refreshes to display client information for that family member. Alternatively, the CCV user can right-click on a family member and select the view citizen context option.Alternatively, the CCV user can select the overflow action (...) on a family member to display a hidden overflow menu, and select the **View Citizen Context** option.

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

## User security and the CCV

The CCV uses existing security settings to ensure that only authorized users can view client information. Case information is protected by case security, service plans are protected by service plan template security, and client information is protected by client sensitivity security.

A user's security role must also include the necessary functions to be able to view the various types of information displayed in the CCV. For information on security, see Configuring security.

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

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

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