Merative Social Program Management 8.1

Product Overview

Note

Before using this information and the product it supports, read the information in Notices on page 39

Edition

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

Contents

1 Product overview

Merative™ Social Program Management supports the end-to-end social program service delivery process. By using Social Program Management, organizations can accelerate and scale the delivery of their social programs, as well as transforming citizen engagement. Organizations can more effectively achieve their social goals by collaborating to address clients' needs.

Social Program Management platform and applications are designed specifically for human services, health, labor, social security, and military and veterans' organizations, collectively referred to as social enterprises. Social Program Management applications and platform support both the Beveridge and Bismarck program delivery models. This support provides the foundation that is required to administer benefits and services to support both needs-based and contribution-based programs.

1.1 Merative™ Social Program Management architecture

Merative™ Social Program Management consists of the foundational platform and extra application modules that build on the foundational capability.

IBM Cúram Social Program Management architecture

Application Modules

Income Support	Citizen Engagement	Verification	Outcome Management
Income Support for Medical Assistance	Life Event Management	Evidence Broker	Provider Management
Child Welfare	Appeals	Business Intelligence and Analytics	Social Enterprise Collaboration

Social Program Management Platform

Intake	Evidence Management	Financial Management	Supervisor Workspace
Participant Management	Eligibility and Entitlement	Funded Program Management	Contribution Management
Integrated Case Management			

Social Program Management Data Model	Administration Application
Business Services Rules — Workflow — Intelligent Evidence Gathering — Decision Assist — Search — Calendaring — Correspondence	Technical Services Adaptors — EAI Connectors — Web Services — Security — Multi-Channel Access — REST API

Merative ™ SPM Platform

The Social Program Management Platform is a business and technology solution that delivers prebuilt health and social program components, business processes, tool sets, and interfaces on top of a dynamically configurable architecture. Social Program Management Platform helps health and social program organizations to provide optimal outcomes for citizens, satisfy increasing demand, and lower costs for organizations.

Social Programs Data Model

The data model delivers a holistic view of clients and their household. It supports the incremental addition of multiple programs and cases with no client duplication at the data model level. As a result, the data model provides a structure for agencies to capture household-specific data once. From then on, that data is used to support the eligibility and enrollment process over multiple program types.

Platform components

The following platform components are built into the Merative ™ SPM Platform.

- **Intelligent Evidence Gathering**
  Automates the evidence gathering process by supporting self-service operations and providing scripted interview tools that reduce data entry and errors.
- **Decision Assist**
  Enables the dynamic creation and maintenance of assessments with limited involvement from the IT team.
- **Financial Management**
  Provides an integrated approach for efficiently managing calculation, scheduling, distribution, and disbursement of payments and liabilities to case participants.
- **Funded Program Management**
  Delivers flexible options for creating and managing funds, including the ability to control spending in program delivery and client service.
- **Supervisor Workspace**
  Allows managers to monitor and manage the task and case load of users. Supervisor Workspace provides an entry point from which they can view summary details of the cases and tasks that they manage.

Integrated Case Management

Integrated case management facilitates the triage and acceptance of participants into programs. It also facilitates the ongoing maintenance of both participant's eligibility for the program, and the supporting evidence for each application.

Integrated case management consists of a number of core social industry components.

Intake

Intake refers to the collection of data about one or more individuals and their circumstances to achieve a particular goal. It consists of multiple phases of data collection, such as triage, or screening.

Merative™ Social Program Management Intake has two main aims:

- To enable workers in an organization to comprehensively and easily complete the intake process.
- To facilitate agencies in providing a collaborative, *No Wrong Door* approach to the intake process for clients in need of benefits or services

This approach reduces the number of contacts a client must make to access benefits or services across multiple agencies.

Social Program Management Intake supports the following intake processes:

- Triage
- Screening
- Application
- Referrals

Eligibility and Entitlement

Eligibility and entitlement management is a complex process that includes evidence capture, entitlement calculation, and change in circumstance processing, including over and underpayment management.

Eligibility and Entitlement support consists of the following default features:

- Business user tools for rapid implementation of legislation and policy
- One time evidence capture and reuse
- Cross-program eligibility
- Assistance unit determination
- Default under and overpayment calculations
- Auto-generation of overpayment cases
- Nominee management
- Creation of financial schedules

Food Assistance is an example of a program where a client can check to see if they are eligible to receive a benefit. Household, Resources, Income, and Expenses are the four categories of evidence that are collected from clients. The evidence supports the Eligibility and Entitlement process, which checks for eligibility across the programs.

Evidence management

Social Program Management evidence is data that is collected in respect of a participant or case. Evidence management supports the evidence lifecycle (Design, Collection, Verification, Activation, Correction, Sharing), while reusing evidence over multiple programs. Evidence management is a key part of the overall Eligibility and Entitlement process. Eligibility is continually reassessed due to changes in circumstance, rules, or rates that occur over time.

Evidence management provides the following features:

- Business user tools for rapid translation of legislation and policy to evidence structure and verification requirements.
- Prebuilt evidence correction security, history, and audits.
- Prebuilt workflows monitor verification validity and initiate reverification process.
- Prebuilt evidence management tools for improved case worker productivity.
- Consistent user experience across evidence lifecycle such as intake, verification, activation, correction, and sharing across programs.

- Evidence visualization focuses user attention on pending tasks such as verification, activation.
- Workspace and workflows for managing shared evidence to incorporate program-specific reviews.

Participant management

The business of a social enterprise organization involves many participant individuals and bodies. Participant types play a role in the delivery or receipt of benefits and services.

A set of information is stored for each participant type. This set includes common information that is stored for all participant types and extra information that is stored only for some participant types. For example, address information is stored for all participant types whereas deduction information is only stored for persons.

Each participant's information is stored in a central location. This approach allows the participant's information to be easily accessed and maintained by users. Participant information can also be reused as necessary throughout the application.

Merative™ Social Program Management Application Modules

Social Program Management application modules provide the foundation of repeatable common business processes, regardless of program. Social Program Management application modules meet the requirements of a single program or multiple programs in a configurable and reusable package.

The following Social Program Management application modules provide extra capabilities to handle the complex processes that are associated with specific programs. These application modules reduce the time and risk that is associated with developing the complex processes of those programs, and provide simplified maintenance update capabilities:

- Merative ™ SPM Income Support
- Merative ™ SPM Income Support for Medical Assistance
- Merative ™ SPM Child Welfare

Appeals

Merative ™ SPM Appeals is an automated solution that provides comprehensive support for the appeals and fair hearings process. Appeals automate the intake, hearings, and decision processes and manages participants in the appeals process. Appeals supports multi-level appeals in which multiple issues for one appellant and respondent can be viewed at a single appeals hearing.

Business Intelligence and Analytics

Merative ™ SPM Business Intelligence and Analytics is a decision support solution that helps social program organizations analyze the effectiveness of their programs and gain insight into the efficiency of their operations. It is scalable from the program to enterprise level. It consists of embedded analytics, domain-specific dashboards, extensive Extract, Transform, Load (ETL) functions, and tool-independent, pre-defined, domain-specific data marts.

Evidence Broker

The Merative ™ SPM Evidence Broker mediates the sharing of evidence across cases, acting as both a receiver and a broadcaster of evidence. It enables source evidence on a source case to

be shared with target evidence on a target case. The Evidence Broker enables social program organizations to decide the types of evidence that can be shared, and the parameters for sharing this information.

Outcome Management

Merative ™ SPM Outcome Management software provides social program organizations with a framework and automated tools to create and manage outcome plans for citizens and their families. Outcome Management is designed to help organizations assess needs, establish goals, plan for goal attainment, and track progress. It supports collaboration and coordination of all resources and delivers a complete understanding of client needs and barriers to success.

Provider Management

Merative ™ SPM Provider Management helps organizations manage providers holistically, resulting in improved service delivery, enhanced efficiency, and sustainable outcomes for citizens. Provider Management provides a common repository of information, reusable business services, and enhanced accessibility for case workers and external providers.

Social Enterprise Collaboration

Merative ™ SPM Social Enterprise Collaboration is a common platform and set of tools for multi-disciplinary collaboration in social program organizations. Multi-disciplinary teams are involved in supporting the needs of clients and families, including other agencies, local providers, and interested community partners.

Universal Access

Merative ™ SPM Universal Access connects citizens to programs, streamlines applications for those programs, and reduces administrative work, allowing case workers to spend more time interacting with citizens. Universal Access provides a configurable citizen-facing application that enables agencies to offer a web self-service solution to their citizens. Use this information to customize the classic citizen application to provide your own custom citizen-facing web application. Alternatively, you can choose to use the Universal Access responsive citizen application, which uses modern technologies and the Social Program Management Design System to provide an enhanced user experience.

Verification Engine

The Merative ™ SPM Verification Engine streamlines the process of verifying evidence that is used in determining eligibility and entitlement as part of program delivery. It provides the functions that are needed for efficient management of verifications where policy or legislation mandates that evidence is verified as a prerequisite for eligibility.

Income Support

Merative ™ SPM Income Support provides complete eligibility determination and benefit calculation for social programs that provide food, cash and medical assistance to families in need. Income Support is a commercial integrated service delivery solution that equips organizations with a powerful, proven set of business tools and processes designed specifically for the effective management of income support programs.

Income Support for Medical Assistance

Merative ™ SPM Income Support for Medical Assistance enables social program organizations to improve the efficiency and effectiveness of managing eligibility and entitlement services for medical assistance. Income Support for Medical Assistanceequips organizations with a powerful set of business tools and processes designed specifically for the effective management of traditional medical assistance, Affordable Care Act (ACA), and Modified Adjusted Gross Income (MAGI)-based Medicaid and Children's Health Insurance Program (CHIP) programs.

Child Welfare

Merative ™ SPM Child Welfare provides a full case lifecycle solution for child welfare organizations. This integrated, cost-effective case management software supports key business requirements, helping to improve organizational effectiveness through family-centric, outcome-focused business processes.

1.2 Technical overview

A high-level overview of the solution architecture of Merative™ Social Program Management from a development and deployment perspective.

The SPM Application Development Environment (ADE)

Social Program Management provides an environment for producing Java EE-compliant applications for social enterprises.

This environment includes the following features:

- Development aids that make it easier to produce n-tier Java EE-compliant applications.
- A high-level business infrastructure that is needed by most enterprise-class systems, and especially social enterprises. In particular, infrastructure is provided to allow the capture of eligibility and entitlement rules for products or programs, and to run these rules in Social Program Management applications.
- A UML application model for these industries.
- Commercial off-the-shelf software components that are based on the application model.
- A pre-built reference application that is constructed with these components.

Development Environment objectives

A summary of the Development Environment objectives.

- **Focus on the business problem:**
  Social Program Management minimizes the amount of non-business-specific functionality that needs to be developed. Because developers are freed up from some of the more tedious and error-prone aspects of client/server development, they can spend more time on activities directly concerned with the business solution.
- **Model-based development:**
  The starting point for all Social Program Management software development is a platform-independent application model, developed using the Unified Modeling Language (UML).

- **Code generation:**
  Many parts of an application are formulaic in nature, and can be expressed concisely through stereotypes and patterns in the application design. By adhering to a model-driven approach, the tools provided with the environment maximize the amount of code that can be generated.
- **Avoidance of platform dependencies:**
  The Social Program Management architecture packages specific platform dependencies in generated code and infrastructure components, minimizing the effects of changing them at a later stage, and thus maximizing the architecture's portability.
- **Use of recognized architectural patterns:**
  The Social Program Management architecture makes extensive use of patterns, such as factory and proxy mechanisms, to enhance application maintainability, performance and portability.
- **Simplified user interface development:**
  Considerable effort can be expended producing quality user interfaces. Social Program Management generates user interfaces based on simple platform-independent definitions, resulting in a dramatic increase in developer productivity.
- **Industry-standard applications:**
  Social Program Management facilitates easier application development, producing robust client/server applications based on industry-standard technologies. Runtime performance, cross-platform deployment, and user interface elegance are key goals of Social Program Managementapplication development.

Runtime architecture

At a logical design level, Social Program Management applications are platform independent. The concrete realization of an Social Program Management application must be deployed in a *real world* environment.

As already mentioned, business objects can be deployed in various ways. The online client/server environment is one of the more important (and complex) ways. Online applications follow the Java EE architecture, which is a modern n-tier architecture with separate Presentation, Application, and Persistence tiers. This logical three-tier architecture has become the standard for developing client/server applications. Separating presentation, application logic, and persistent storage allows the different concerns of these tiers to be considered in relative isolation and promotes easier design. Social Program Management simplifies this concept even further by hiding much of the complexity of n-tier application development.

The relationship to Java EE architecture

Consider the Java Enterprise Edition (J2EE) architectural layers, as described in the Distributed Multitiered Applications topic in the Jave EE 5 Tutorial.

For more information about the Distributed Multitiered Applications, see the The Java EE 5 Tutorial .

The Merative™ Social Program Management client-side presentation tier consists of HTML and JavaScript user interfaces that are rendered by a standard browser program on the user's desktop. Only HTML and JavaScript user interfaces are directly supported with client generation tools. Other types of clients can also be developed by using generated Server Access Beans to connect to the server.

At run time, the HTML user interface is generated by a server-side presentation layer that consists of JavaServer Pages. Browser clients communicate with this layer over HTTP, typically encrypted with SSL for security reasons.

The server-side presentation layer communicates with the server-side business logic through the RMI-IIOP protocol. Typically, business objects are presented in the business logic tier as Session EJBs although they can also be simple Java RMI objects for the simpler deployment option that is often used during application development. In summary, business objects are plain Java objects. Any required middleware connections are generated when the application is built.

The back end of the Merative™ Social Program Management architecture is a relational database plus other enterprise and legacy applications. Again, the middleware plumbing that is required to communicate with the EIS is generated.

Summary of Java Technologies used

A summary of the Java Technologies used by Social Program Management.

- **EJB Enterprise Java Beans**
  Social Program Management uses Enterprise Java Beans for its server component model.
- **Java Servlets**
  Java Servlets are used by the presentation tier.
- **JSP Java Server Pages**
  Java Server Pages are used to generate the user interface.
- **JTA Java Transaction API**
  Java Transaction API is used for starting and committing transactions.
- **JDBC Java Database Connectivity**
  Java Database Connectivity is used for the middleware to communicate with the application database.
- **JMS Java Message Service**
  Java Message Service is used for deferred processing and workflow within Social Program Management.
- **JNDI Java Naming and Directory Interface**
  Java Naming and Directory Interface is used in Social Program Management both for application initialization-time lookup of Data Sources and Queues as well as to locate Enterprise Java Beans from the Presentation Tier.
- **RMI-IIOP Remote Method Invocation**
  Remote Method Invocation over IIOP is used as the communications protocol between the presentation and application tiers.

Development architecture

The SPM Development Environment is composed of a Server Development Environment (SDEJ) and a Client Development Environment (CDEJ).

The Social Program Management development approach has the following key features:

- Metamodel-based development approach.
- Application model that is based on UML.
- Code generators that produce significant portions of client/server applications.
- Simplified coding of handcrafted business logic.
- Simplified development of user interfaces.

- High-level business infrastructure.

Server Development Environment

The Server Development Environment uses a model-based approach to development. An application model is defined in a business-centric and platform-independent manner using a UML modeling tool.

The model is the key building block for the code generators as it defines all the required entity objects and process objects.

The generators will create the necessary classes and files for the application structure. This structure will also have all the Remote Interface Layer code, the Data Access Layer code and the Business Object Layer code as well as handcrafted code.

The application model contains:

- **Domains:**
  Application-specific datatypes.
- **Entities:**
  The objects modeled and persistently stored by the application.
- **Processes:**
  Related sets of activities to achieve some business goal.
- **Value objects:**
  Passed as messages throughout the application.

Client Development Environment

The Merative™ Social Program Management client consists of HTML pages that are generated by JSPs. The JSPs are generated from XML screen definitions and style sheets control the formatting of screen pages. The XML screen definitions are independent of the presentation layer, and the Merative™ Social Program Management specific format is called user interface metadata (UIM) format.

Automatic data validation and conversion is based on application model definitions with support for custom widgets and JavaScript exit points.

User interface development

A major goal of the Merative™ Social Program Management development environment is to simplify user interface creation. You can associate client pages with particular back-end server interfaces. Because metadata about these interfaces is already captured in the application model, you can use this information for user interface generation.

Most of the remaining work for client development is to list the fields for each client page. Default widget types are provided for fields and controls on the screen, which is based on its information of the datatypes that are associated with fields.

Fields follow a grid layout in clusters and lists that are specified in XML along with the overall page hierarchy. Widget types are determined automatically by connections.

An example of the User Interface Metadata (UIM) code for the *firstname* field is as follows:

```
<FIELD LABEL="Field.Label.FirstName">
<CONNECT>
<SOURCE NAME="Interface1" PROPERTY="firstForename"/>
</CONNECT>
         </FIELD>
```

The LABEL attribute of the FIELD element describes the label text that is associated with this field when a client page is displayed. The value Field.Label.FirstName is a reference to the actual label value in a separate property file. Using strings that are externalized in property files allows for easy localization of client applications. The SOURCE element describes where this field's contents comes from when the page is displayed. The NAME attribute of the SOURCE element specifies a specific back-end interface that is defined in the application model. The PROPERTY attribute specifies a particular datum that is returned by the back-end interface.

The exact location of the field on the screen is not specified. There is no information about the field's datatype or the associated HTML control. All of this information is provided automatically at application build time. The simplicity of UIM pages makes them easy to copy and paste from templates, which contributes to a high level of developer productivity.

Business infrastructure

Social Program Management provides a comprehensive business infrastructure.

Rules Development Environment

Cúram Express Rules (CER) is a language for defining questions that can be asked, and the rules for determining the answers to those questions. The environment for developing CER rules is the CER Rules Editor.

In CER, each question specifies:

- The question name.
- The type of data which provides the answer to the question.
- The rules for providing the answer (if the question is asked).

The answer to a question can be as simple as yes or no. For example, the question "Is this person eligible to receive benefits?". However, CER lets you define answer types to be as complex as you need. For example, the question "Which groups of people in the household have an urgent need?" is answered by providing a list of household groups, with each household group containing a list of people.

The environment for developing CER rules is the CER Rules Editor. This editor provides a user-friendly environment and interface for both technical and business users to create, edit and validate a rule set and its rule classes. For more information about the CER Rules Editor, see the *Cúram Express Rules Reference Manual* and the *Working with Cúram Express Rules Guide*.

Eligibility and entitlement processing

The Eligibility and Entitlement Engine provides a mechanism for determining eligibility and entitlement on a case over arbitrary periods of time. This determination allows Cúram to automatically assess and reassess cases, taking into account legislative changes, changes in rates, citizen changes in circumstances, and other complexities.

Eligibility and Entitlement uses Cúram Express Rules for this functionality. The CER engine supports this process by acting on the rules that are defined in the CER Rules Editor and the evidence that is captured on a case. The flexibility of CER rules means they can also be used to define display rules to convey information about a case to business users. These rules can be as terse or as verbose as they need to be.

For more information about the determination of eligibility and entitlement and the CER Rules Engine, see the *Inside Eligibility and Entitlement Using Cúram Rules Guide*.

Workflow

The Social Program Management workflow management system, which is based on the Workflow Management Coalition's standards, allows organizations to break down business processes into their constituent activities and to then build flexible relationships between them.

Procedural automation of a business process is done by managing the sequence of work activities and the allocation of appropriate human and/or system resources associated with the various activity steps.

The Social Program Management Workflow Management System comprises an interactive Process Definition Tool used to define the workflow activities and transitions, and a Workflow Engine which manages the workflow in the production environment. It also includes an administration component for maintaining instances of workflow process definitions.

This approach ensures that organizations can implement and manage their processes in a flexible manner and maximizes their ability to respond to change.

Workflow activities may involve an automated step (calling a Social Program Management Business Process), or a manual step (creating a task for a user to perform manually).

1.3 Tablet support

The Merative™ Social Program Management application has been certified for use on a tablet.

For the optimum user experience on a tablet, the following prerequisites are recommended:

- Use a supported web browser.
- The minimum recommended resolution is 1366x768. The optimum DPI setting is **Normal** size.
- Use a tablet device with dimensions of approximately 8 inches (21 centimeters) and above. The minimum recommended view-port size is 1024x768.
- Use the device in a landscape orientation to maximize screen width.
- For users with low vision, accessibility is certified against VoiceOver on the iOS platform that uses an external keyboard.
- Use an external keyboard for intensive data entry tasks.
- Use a reliable network connection, for example, wifi. The application’s performance is limited by the quality of the network connection. Degradation in the network connection reduces application performance.

Microsoft Word integration

Android and iOS do not support integration technologies.

1.4 Deprecated functionality

If you are upgrading from an earlier version of Merative™ Social Program Management, review the features that are deprecated from the current version and earlier releases of Social Program Management.

 This icon indicates deprecated functionality in the product documentation.

For details of the artifacts that were deprecated for each feature. see the Release Notes.

When a feature is deprecated, Social Program Management continues to support the feature, but no longer plans to enhance it and might remove the capability in a subsequent release of the product. For more information about deprecation, see the *Server Developer's Guide*.

For information about previously deprecated features that have been removed from the product, see Removed functionality.

Version 8.1

- **Toggles for inline menu items on actions menus**
  The `curam.actionmenus.display-inline.enabled.tab`, `curam.actionmenus.display-inline.enabled.page`, and `curam.actionmenus.display-inline.enabled.list` application properties are deprecated. In 8.0.3, these application properties were needed to enable inline menu items on actions menus, but from 8.1 onwards, this behaviour is enabled by default.

  For more information about enabling inline menu items on actions menus, see the *Web Client Reference Manual*.

- **Superseded APIs and UIMs for multi locale**
  Superseded APIs and UIM files related to the introduction of multi locale support for Work Queues, Quick Links, and Organizational Structure functionality are deprecated.

- **Remaining Generic Search Server (GSS) artifacts**
  The remaining artifacts associated with the GSS feature are deprecated.

Version 8.0.1

- **Configuring IEG currency symbols**
  The `REACT_APP_CURRENCY_MASK_LEFT_ADDON` and `REACT_APP_CURRENCY_MASK_RIGHT_ADDON` environment variables are deprecated. The variables were used to configure the currency symbol that is displayed for currency fields in IEG forms. The variables have been replaced by the

REACT_APP_CURRENCY_MASK_ADDON environment variable. For more information about configuring environment variables and currency symbols, see the *Merative™ SPM Universal Access Responsive Web Application Guide*.

Version 8.0.0

- **ClientAccess**
  The ClientAccess functionality that is provided with the deprecated Case and Participant Index (CPI) component of the Social Enterprise Collaboration (SEC) module that allows for external client data to be viewed in SEC folders and in the citizen context viewer is deprecated.
- **Universal Access APIs for password reset**

  The following APIs are not suitable for production and are now deprecated. Customers must provide their own authentication implementation, see the *Merative™ SPM Universal Access Responsive Web Application Guide*.

  - `/ua/email_password_reset`
  - `/ua/secret_question_password_reset`
  - `/ua/password_reset`

  For information about the removal of these APIs from the product in Version 8.1, see the *Product Overview*.
- **Caseworker UI**
  The JavaServer Pages (JSP) that render the calendar for the date picker are deprecated. The JSP is no longer used as it is effectively replaced by Carbon. The JSP file is *`%CURAMCDEJ%//lib/curam/web/popups/date-selector.jsp`*. The Citizen Portal does not use this JSP. The date picker in the Citizen Portal uses the `DateTextBox` from the UI toolkit and is referenced in *`TextEditRenderer.java`*.
- **ScanMilestoneDeliveryStartDate and ScanMilestoneDeliveryEndDate**
  `ScanMilestoneDeliveryStartDate` and `ScanMilestoneDeliveryEndDate` batch processes are deprecated as they have been replaced by new batch processes `ScanMilestoneDeliveryStartDateBatch` and `ScanMilestoneDeliveryEndDateBatch` that use the batch streaming infrastructure.

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Version 7.0.10

- **Flex Discussion Widget**
  The Flex Discussion Widget is deprecated because it is no longer used by any UIM pages. All instances of the Flex version of this widget were replaced with regular UIM pages.
- **Flex Widget for the SEC Rich Text Editor**
  The Rich Text Editor in the Social Enterprise Collaboration (SEC) MDTWorkspace is deprecated because it is no longer used by any UIM pages. All instances of the Flex version of the Rich Text Editor were already replaced with the CKEditor JavaScript Rich Text Editor.
- **Flex Widget for the Universal Access Rich Text Editor**
  The Rich Text Editor in Universal Access is deprecated because it is no longer used by any UIM pages. All instances of the Flex version of the Rich Text Editor were already replaced with the CKEditor JavaScript Rich Text Editor.
- **Timeline and Progress Timeline (Outcome Plan Workspace)**
  The Timeline and Progress Timeline (Outcome Plan Workspace) Flex Widget is deprecated because a JavaScript™ alternative is available by default.

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Version 7.0.2

- **Evidence broker**
  An enhanced version of the evidence broker was released in version 7.0.2 and the original version of the evidence broker has been deprecated. For customers who choose to continue using the previous version of the evidence broker, some configuration is required, as described in the *Enabling Evidence Broker 1* section in the *Social Program Management Upgrade Guide*.
- **FILE_EDIT widget**
  The Microsoft™ Word integration feature `FILE_EDIT` is deprecated. `FILE_EDIT` widget allows a user to edit a Microsoft Word document on their local computer and then save it to the Social Program Management database.
- **Person/Prospect Person Evidence Sharing Automation**
  This section applies only to evidence sharing with the evidence broker version 7.0.1.x and earlier, which corresponds to the value of the ENV_ADVANCED_EVIDENCE_SHARING_SHARING_ENABLED property being set to `NO`. See the the *Evidence Broker Guide* section for more information about how sharing occurs when the ENV_ADVANCED_EVIDENCE_SHARING_SHARING_ENABLED property is set to `YES`.

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Version 7.0.0

- **Business Intelligence & Analytics (BI&A): Oracle Warehouse Builder (OWB) and DB2 ETLs**
  Oracle Warehouse Builder ETL and DB2 ETL code is deprecated. For information about the feature's removal from the product in Version 8.1, see the *Product Overview*.
- **Case Determination Graphical Display**
  The Case Determination Flex Widget is deprecated because it is part of the Case Determination feature that was deprecated in Social Program Management 7.0.0.
- **Cúram Express Rules (CER) Key Decision Factors**
  Key Decision Factors rules and the graphical/list view display of key events within a case that form part of the CER infrastructure is deprecated. Decision Details rules are available to implement the display of similar key event information.
- **Provider Management (CPM): Performance Monitoring**
  The CPM Performance Monitoring functionality that provides the ability to configure performance measures and evaluation criteria for a provider to enable agencies to measure provider performance is deprecated. For information about the feature's removal from the product in Version 8.1, see the *Product Overview*.
- **Provider Management (CPM) Taxonomy**
  The CPM taxonomy functionality that provides the ability to establish a hierarchy of terms and index those terms to provider service offerings for use in searching for services is deprecated. For information about the feature's removal from the product in Version 8.1, see the *Product Overview*.
- **Evidence Flow**
  The Evidence Flow view of evidence displayed within the Evidence Workspace was deprecated. For information about the feature's removal from the product in Version 8.0.0,

see Removed functionality. The Evidence Dashboard view is available to users to manage evidence within a case.

- **Generic Search Server**
  The Generic Search Server (GSS) that uses Lucene for indexing and search functionality within the product is deprecated. For information about the feature's removal from the product in Version 8.1, see the *Product Overview*.
- **Health Care Reform (HCR): Intake Reports**
  The HCR Intake Reports provided to help address the ability for agencies to manage failed applications is deprecated.
- **Legacy Employment Contribution Entities**
  Entities that enabled customers to implement contribution-based solutions in employment areas such as pensions and unemployment insurance tax is deprecated. For information about the feature's removal from the product in Version 8.0.0, see Removed functionality. Existing framework functionality including the liability product, financial manager, and employer participant type can be used for the basis of an employment contribution solution.
- **Non-Identical Evidence Mapping (Superseded)**
  The original version of non-identical evidence mapping functionality that supported evidence sharing only where evidence was identical down to the domain definition level is deprecated. A new version that provides enhanced ability to map evidence with different domains is available.
- **Over/Underpayments Graphical View**
  The graphical view of over/underpayments generated within a Product Delivery case is deprecated. For information about the feature's removal from the product in Version 8.0.0, see Removed functionality. The Statement view is available to users for understanding the history of over/underpayments within a case.
- **Social Enterprise Collaboration (SEC):Case & Participant Index (CPI)**
  CPI functionality provided as part of the SEC module to enable Master Data Management (MDM) capabilities and display of information from an external system within Cúram is deprecated.
- **Spell Checker**
  The Spell Checker add-on to the rich text editing feature that is found in functionality such as Notes is deprecated. All supported browsers now include built in spell checking capabilities that can be used as an alternative. For information about the feature's removal from the product in Version 8.1, see the *Product Overview*.

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Version 6.0.5.8

- **The Flex versions of Business Intelligence Charts**
  The Flex versions of Social Program Management Business Intelligence Charts are deprecated. All provided BIRT charts that were previously rendered by using Flex/Flash have been rendered in native BIRT format as PNG images since Social Program Management 6.0.5.8.

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Version 6.0.5

- **Intelligent Evidence Gathering (IEG)**
  IEG 1 is deprecated and superseded by IEG 2.

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Version 6.0.0

- **Short Name Substitution**
  The short name substitution feature is deprecated. The supported third-party databases no longer have the SQL identifier limitations that originally necessitated the feature. Therefore, it is no longer necessary to use the feature and it has been removed from the product documentation. If you still require the feature, contact your Merative ™support representative for the information that was available previously in the documentation.

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1.5 Removed functionality

If you are upgrading from an earlier version of Merative™ Social Program Management, be aware of the features that have been removed from Social Program Management.

For more information about removed features, see the Release Notes.

To assess whether your implementation of Social Program Management has any dependency on the removed features, run the Artifact Dependencies Search Tool, which is available to download from Merative ™ Support. You must request access to download software.

The following sections list features that have been removed from Social Program Management 8.1.0, alphabetically by name.

1.6 PDF format

This topic provides information about accessing the online content in PDF format.

Prebuilt PDF files

Prebuilt PDF files are posted at Merative™ Social Program Management PDF library

2 Accessibility in Merative™ Social Program Management

The Social Program Management application is accessible and adheres to Web Content Accessibility Guidelines (WCAG) 2.1 (Level A & AA), US Revised Section 508, and EN 301 549 V3.1.1 standards. While Social Program Management is committed to fully meeting these accessibility standards and legislations, we have some exceptions.

For more information about Social Program Management's accessibility conformance, including exceptions, see our Accessibility Conformance Report for Social Program Management 8.0.2 or earlier versions. For Social Program Management 8.0.3 or later versions, the report is publicly available upon request. Alignment to the standards is a strategic part of our ongoing product evolution, and exceptions will be addressed over time.

Accessibility features are provided to aid users with disabilities in navigating the application.

Supported technologies

The accessibility information assumes that you are using the supported software to interact with the Social Program Management user interface. For more information about the supported technologies, see the Social Program Management Supported Prerequisites.

2.1 Accessibility

Accessibility features help users with physical disabilities, such as restricted mobility or limited vision, to use software products successfully.

The accessibility features in the product enable users to:

- Use technologies, such as screen reader software and digital speech synthesizers, to hear what is displayed on the screen. Consult the product documentation of the assistive technology for details on using the technology with this product.
- Perform tasks with the software using only the keyboard.

Merative ™ and accessibility

Merative ™ is committed to producing accessible products.

For more information about the commitment that Merative ™ has to accessibility, see the IBM® Human Ability and Accessibility Center. The IBM® Human Ability and Accessibility Center is at the following web address:

www.ibm.com/able (opens in a new browser window or tab)

2.2 Accessibility features for desktop

A number of accessibility features are available in the Social Program Management application for desktop users. These accessibility features are designed for users with restricted movement or low vision who interact with the application by using a keyboard, a screen reader, or both.

Multiple-selection list boxes

Two widgets in the Social Program Management application contain multiple-selection list boxes, the transfer list widget and the multiple-selection widget. You can use a specific keyboard command to make multiple selections at the same time in these widgets.

A multiple-selection list box displays multiple selection options at the same time so that the user can make multiple selections. A keyboard or screen reader user must use specific keyboard commands to make multiple selections.

The following steps describe how to select multiple items with a keyboard, a screen reader, or a combination.

The Microsoft™ Edge browser is supported for accessibility in Social Program Management.

Complete the following steps to select multiple items on the transfer list widget and the multiple selection widget with Microsoft™ Edge.

1. Give focus to the multiple-selection form field by using the Tab key.
2. Use the Up Arrow and Down Arrow keys to navigate through items and move the selected state with focus, that is, single selection.
3. Press Shift and the Up Arrow or Down Arrow keys to move focus and to toggle the selected state of the previous or next option, that is, multiple adjacent selections.
4. Press Ctrl+Alt and the Up Arrow or Down Arrow keys to move focus without the selected state. In this mode, press the Space bar to change the selected state of each highlighted item, that is, multiple selections.

Single select lists

Use specific keyboard commands to navigate single select lists by keyboard, screen reader, or a combination of both.

Procedure

1. Navigate the single select list with a screen reader:
   a) Navigate to **Single Select List** in any Social Program Management application. Lists of radio buttons are displayed.
   b) Use the Tab key to give focus to the radio button.
   c) Press the Enter key to select the radio button. When users press Enter to make a selection, JAWS also enters the FORMS MODE.
   d) Use the Up Arrow and Down Arrow keys to navigate through the items in the **Single Select List** and to change the selection.
2. Navigate the single select list without using a screen reader:

a) Navigate to **Single Select List** in any Social Program Management application. Lists of radio buttons are displayed.
b) Use the Tab key to give focus to the radio button.
c) Press the Space bar to select the radio button.
d) Use the Up Arrow and Down Arrow keys to navigate through the items in the **Single Select List** and to change the selection.

Section shortcut panel

The section shortcut panel contains links to allow quick access to common user areas in the Social Program Management application. These links are grouped in section shortcut categories.

About this task

Accessibility access features are integrated into the section shortcut panel to help screen reader and keyboard users.

Use the following steps to navigate and interact with the section shortcut panel by using a keyboard.

Procedure

1. Navigate to the expand icon on the section shortcut panel by using the Tab key and press Enter. The section shortcut panel expands.
2. Press the Tab key to give focus to the expanded section shortcut category. The screen reader identifies this element as a tab.
3. Use the Up Arrow and Down Arrow keys to navigate through each section shortcut category in the section shortcut panel. The section is automatically expanded when it receives focus.
4. When a section shortcut category receives focus, you can press the Tab key to access each link in that category.

Tabs

Navigate and interact with tabs and their content in the Social Program Management application by using a screen reader and keyboard.

About this task

The Social Program Management application is divided into a hierarchical structure with tab navigation at each level; application sections, application tabs, content area navigation bar tabs and in page navigation tabs. Accessibility controls are integrated into these tab navigation elements to help keyboard and screen readers.

Use the following steps to navigate and interact with these tabs and their content by using a screen reader, a keyboard, or a combination of both:

Procedure

1. Give focus to the selected tab in the tab bar by using the Tab key. Only the selected tab can be given focus by using the Tab key.
2. Use the Up and Down arrow keys to navigate through each tab in the tab bar.

3. When a tab receives focus, you can press the Tab key to access the content in the selected tab.
4. To close a tab, give focus to the relevant tab and press the Delete key. On Microsoft™ Windows™, you can also press Ctrl+W.

   Pressing Shift+F10 with focus on the tab title, or right-clicking the tab title, opens a context menu with the option to close the tab if available. Not all tabs can be closed as the delete function can be disabled.
5. To expand an action menu, press Shift+Enter.

Rich Text Editor

You can enter formatted text information in the Rich Text Editor with a keyboard or screen reader by placing focus on the Rich Text Editor toolbar.

About this task

The Rich Text Editor in the Social Program Management application enables users to enter, format, and style text. By default, focus is given to the text area in the editor that allows users to enter unformatted text information. To enter formatted text information, you must access the Rich Text Editor toolbar.

Use the following steps to enter formatted text with a keyboard, screen reader, or a combination of both:

Procedure

1. Give focus to the Rich Text Editor text area by using the Tab key.
2. Press Alt+F10 to give focus to the toolbar.
3. Navigate through options in the toolbar by using the Tab key or the Up Arrow or Down Arrow keys.
4. Press Enter to select an option in the toolbar. The focus is automatically brought back to the text area.
5. Press Esc to exit the toolbar without making a selection.

IEG date picker in the classic Universal Access application

You can use specific keyboard commands to navigate and make selections on the IEG date picker in the classic Merative ™ SPM Universal Access application.

About this task

A date picker form field displays a calendar widget to a user so that the user can select a specific date. To select the specific date in the date picker widget by using a keyboard or a screen reader, or a combination, users must use specific keyboard commands.

Procedure

1. Use the Tab key to give focus to the date picker form field.
2. Press the Down Arrow key to open the date picker.
3. Press the Left Arrow, Right Arrow, Up Arrow, and Down Arrow keys to navigate between date cells.

4. Press Page Down to navigate to the same day in the next month.
5. Press Page Up to navigate to the same day in the previous month.
6. Press Alt+Page Down to navigate to the same day in the next year.
7. Press Alt+Page Up to navigate to the same day in the previous year.
8. Press Home to navigate to the first day in the month.
9. Press End to navigate to the last day in the month.
10. Press Enter, Space bar to select the date.

2.3 Accessible alternatives for desktop

A number of user interface elements in the Merative™ Social Program Management application have alternative accessibility features for keyboard and screen reader users on desktop computers.

The Calendar

View calender events using the accessible Calendar List View.

About this task

The Calendar gives users the options to display events using a monthly, weekly or daily view. These views are inaccessible for screen readers. As an accessible alternative users can view calender events using the Calendar List View. This list view can be accessed by performing the following steps:

Procedure

1. Select the "Calendar" Application Section. By default the "Calendar View" Application Tab will be displayed.
2. Select the "List View" Application Tab.
3. In this view all calendar events are displayed in an accessible table.

The Cúram Express Rule Editor

Create and publish new rule sets and modify existing ones in an accessible manner in the administration application.

Cúram Express Rule Sets contain rules that can be used in a number of ways. A rule set can contain legislative rules that govern the eligibility and entitlement for a related program or some advisory rules to assist a case working to process a clients application.

A CER rule set is stored as XML on the database and is maintained through a number of administration screens in the online application. There is also a Flex based CER editor that is used for periodic maintenance however certain aspects of this editor are not accessible.

Many rule sets are used during the execution of key client application processing, therefore all changes to rules are performed within a development or staging environment where those changes can be tested and approved.

The developer must have knowledge of the structure and definition of a CER rule set that is described in the *Cúram Express Rules Reference Manual*. For development outside of the online application an XML editor is required. As this is a development activity it is expected that the developer has access to the application database and can log into the online application at any time.

Creating a New Rule Set

About this task

The following sections outlines how a user with disabilities can create a new rule set in the administration application.

Procedure

1. In the administration application, select the **Administration Workspace Application Section**.
2. In the **Shortcuts Panel**, select the **Rules and Evidence** category.
3. Within this category, select the **Cúram Express Rule Sets** link. This opens a page containing a list and an option to create a new rule set.
4. To create a new rule set, select the **New** page action and enter the rule set name, the display name and category. Note that the rule set name is the technical identifier used later to download the rule set.
5. To edit this newly created rule set, open the command prompt and navigate to the `<application install directory>/EJBServer` folder.
6. Enter **build creole.extractrulesdata -Dcreolerulesetname=<your rule set name> -Dinedit=true** into the command prompt. This extracts the rule set to the `<application install directory>/EJBServer/dataextractor/blob` folder.
7. The developer copies this rule set to their custom component and places it into a `Creole Rule Sets` folder. Using the preferred XML editor, the developer can define the rules according to the guidelines outlined in the Cúram Express Rules Reference Manual.
8. Once complete the developer can validate and upload the rule set by using the command line targets **build creole.validate.rulesets** and **build creole.upload.rulesets** respectively.

Changing Existing Published Rule Sets

About this task

The following section outlines how a user with disabilities can publish an existing rule set in the administration application.

Procedure

1. In the administration application, select the **Administration Workspace Application Section**.
2. In the **Shortcuts Panel**, select the **Rules and Evidence** category.
3. Within this category, select the **Cúram Rule Sets** link. This opens a page containing a list of existing rule sets. Search for the rule set of interest.
4. To publish this rule set, open the command prompt and navigate to the `<application install directory>/EJBServer` folder.

5. Enter **build creole.extractrulesdata -Dcreolerulesetname=<your rule set name> -Dinedit=true** into the command prompt. This extracts the rule set to the *<application install directory>/EJBServer/dataextractor/blob* folder.
6. The developer copies this rule set to their custom component and places it into a *Creole Rule Sets* folder. Using the preferred XML editor, the developer can define the rules according to the guidelines outlined in the Cúram Express Rules Reference Manual. To ensure consistency across the files, apply update annotations to the properties file as well as to the XML file.
7. Once complete, the developer can validate and upload the rule set by using the command line targets **build creole.validate.rulesets** and **build creole.upload.rulesets** respectively.
8. The corresponding properties files can be uploaded via the **Application Resources** link in the **Intelligent Evidence Gathering** shortcut panel category.
9. On the **Application Resources** page, select **Property** in the **Category** drop-down and click **Search**.
10. Locate the property file with the same name as the file to upload and select **Edit** from the list row action menu.
11. In the modal, select the **browse** button and locate the properties file to upload. Note: This will override the properties file store for this rule set.

The Data Store Editor

You can create and modify data store schemas in an accessible manner.

The procedures in the following section outline how a user with disabilities can create and modify data store schemas in the administration application.

Before they use the procedures, users must understand the structure and definition of data store schemas that are described in the *Working with Intelligent Evidence Gathering (IEG) Guide*. For development outside the online application, an XML editor is required.

Creating a Data Store Schema

A user with disabilities can create a data store schema in the administration application.

About this task

Use the following procedure to upload a new data store schema in the administration application.

Procedure

1. Compose a data store schema offline in an XML editor.
2. In the administration application, select the **Administration Workspace** application section.
3. In the Section Shortcuts Panel, select the **Intelligent Evidence Gathering** category.
4. Within this category, select the **Datastore Schema** link. A page opens that contains a search form and an option to import data store schemas.
5. To import the offline data store schema, select the **Import** page action.
6. In the form that is displayed in a modal dialog, enter the required schema name and ID into the appropriate fields.
7. Click the schema **browse** button.

8. In the Windows Explorer dialog that opens, select the new offline data store schema and click **Save**. The XML in the data store schema is validated. If no validation errors occur, the data store schema is uploaded to the online application.

Modifying Existing Data Store Schemas

A user with disabilities can modify an existing data store schema in the administration application.

About this task

Use the following procedure to modify an existing data store schema in the administration application.

Procedure

1. In the administration application, select the **Administration Workspace** application section.
2. In the Section Shortcuts Panel, select the **Intelligent Evidence Gathering** category.
3. Click the **Datastore schema** link.
4. In the search form that is displayed in a new page, search for the appropriate data store schema, and select the corresponding list action button. Select the **Download** option, which you can use to save an offline copy of the selected data store schema.
5. Modify the downloaded data store schema script in an XML Editor.
6. Import the schema by selecting the **Import** page action.
7. In the form that is displayed in a modal dialog, enter the name and ID of the original data store schema into the appropriate field.
8. Select the **Overwrite** option.
9. Click the schema **browse** button.
10. In the Windows Explorer dialog that opens, select the modified offline data store schema and click **Save**. The XML in the data store schema is validated. If no validation errors occur, the data store schema overwrites the pre-existing data store schema in the online application.

The Intelligent Evidence Gathering Editor

IEG scripts can be created and modified offline in an accessible manner.

The following sections outlines how a user with disabilities can create and modify IEG scripts in the administration application.

Before beginning, the user must have knowledge of the structure and definition of a IEG script that is described in the *Working with Intelligent Evidence Gathering (IEG) Guide*. For development outside of the online application an XML editor is required.

Creation of a New IEG Script

About this task

The following sections outlines how a user with disabilities can upload and validate a new IEG script in the administration application:

Procedure

1. Compose an IEG Script offline in an XML editor.
2. In the administration application, select the **Administration Workspace** application section.
3. In the Section Shortcuts Panel select the **Intelligent Evidence Gathering** category.
4. Within this category select the **Scripts** link. This opens a page that contains a search form and an option to import IEG Scripts.
5. To import the offline IEG Script, select the **Import** page action.
6. This opens a modal dialog that contains a form. Enter the required IEG script name into the appropriate input field.
7. Select the IEG script **Browse** button. This opens a Windows Explorer dialog allowing the newly created offline IEG script to be selected.
8. Once selected, press the **Save** modal dialog button. This validates the XML in the IEG script. If no validation errors are encountered, the IEG script is uploaded to the online application.
9. Once the modal has closed, search for the newly uploaded IEG script in the search form provided. The search results display in the list below the search form.
10. Find the IEG script in question in the list and select the corresponding list action button. Select the **Validate** option. This opens a modal dialog that prompts the user to select the Datastore Schema that corresponds to the IEG script.
11. Once a schema is selected, press the **Validate** modal button. This validates the IEG script. Any validation errors encountered are displayed in the open modal dialog.
12. The corresponding properties file(s) can be uploaded via the **Application Resources** link in the Intelligent Evidence Gathering shortcut panel category.
13. On the Application Resources page, select the **Add Resource** page action.
14. This opens a modal dialog that contains a form. Fill in the appropriate details for the required property resource.
15. Select the content **Browse** button. This opens a Windows Explorer dialog allowing a new property file to be selected.
16. Select the **Save** modal button. This will add the resource to the online application.

Modifying Existing IEG Scripts

About this task

The following sections outlines the how a user with disabilities can modify and validate an existing IEG script in the administration application:

Procedure

1. In the administration application, select the "Administration Workspace" application section.
2. In the Section Shortcuts Panel select the "Intelligent Evidence Gathering" category.
3. Within this category select the "Scripts" link. This opens a page that contains a search form.
4. Using the search form, search for the appropriate IEG script and select the corresponding list action button. Select the "Download" option. This allows a user to save an offline copy of the selected IEG script.
5. Modify the downloaded IEG script in an XML Editor.
6. Once complete, import this script by selecting the "Import" page action.

7. This opens a modal dialog that contains a form. Enter the name of the original IEG script into the appropriate input field.
8. Tick the check box labeled "Overwrite".
9. Select the IEG script browse button. This opens a Windows Explorer dialog allowing the modified offline IEG script to be selected.
10. Once selected, press the "Save" modal dialog button. This validates the XML in the IEG script. If no validation errors are encountered, the IEG script overwrites the preexisting IEG script in the online application.
11. Once the modal has closed, search for the newly uploaded IEG script in the search form provided. The search results display in the list below the search form.
12. Find the IEG script in question in the list and select the corresponding list action button. Select the "Validate" option. This opens a modal dialog that prompts the user to select the Datastore Schema that corresponds to the IEG script.
13. Once a schema is selected, press the "Validate" modal button. This validates the IEG script. Any validation errors encountered are displayed in the open modal dialog.

Browser zoom

Use toggle buttons to collapse the Context, Shortcuts, and Smart panels to more easily access the navigation bar tabs and the page content area.

About this task

To facilitate users with low vision, the Social Program Management application is designed to correctly resize when the browser zoom setting is increased to 200%. However, in some cases, not enough space is available to display all navigation items on the screen at one time. When viewing the application with browser zoom level of 200%, the content in the Context panel can push the navigation bar tabs off the screen, and the Shortcuts and Smart panels can make the space available for the page content area smaller. As an accessible alternative, users can perform the following actions.

Procedure

1. Navigate to the toggle buttons for the Context, Shortcuts, and Smart panels.
2. Click the toggle buttons to collapse the panels and easily access the navigation bar tabs and content area.

Planning workspace

Use the planning workspace to manage activities and objectives.

About this task

Planning workspace manages Activities and Objectives. Some functionality, such as the drag and drop, timeline view, and the objective and activity progress graphs are not fully accessible. Use the **Objective** tab and **Activity** tab to view an accessible version of the information that is contained in the planning workspace and to perform the same actions.

Pods

Pods are user interface widgets that users can customize.

Pods are shortcuts to view information and perform actions within the application. Pods are not accessible, but because pods act as containers of shortcuts, alternative accessible ways exist to reach the same information or perform the same actions. Pods can contain whatever artifact you want, for example, links to Search person pages or Case pages.

The following examples show alternative accessible ways to reach the same information or perform the same actions.

The My Cases link on pods. To access the same information you can:

1. Open the Cases and Outcomes tab from the application section.
2. Expand the Shortcuts panel, expand the Cases category, and select the My Cases menu item.

The Search for a person link on pods. To access the same information you can:

1. Open the Cases and Outcomes tab from the application section.
2. Expand the Shortcuts panel, expand the Search category, and select the Person menu item.

The My Appointments pod. To access the same information you can:

1. Open the Calendar tab from the application section.
2. Go to the List View tab to see the list of appointments for the user.

The Create Task link in My Tasks pod. To access the same information you can:

1. Open the Inbox tab from the application section.
2. Expand the Shortcuts panel, expand the Tasks category, and select the My Tasks menu item.
3. On the My Tasks tab, open the Tab actions menu and select the New Task menu item to open the New Task dialog.

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