COURSE ABSTRACT

Fundamentals of the Merative SPM Platform for Business Analysts 7.X

9D72G

Course Description

This self-paced course introduces the fundamentals of the Merative Social Program Management (SPM) Platform. It presents a business analyst (BA) and caseworker overview that introduces the key components of Merative SPM, namely, SPM Platform User Interface, Participant Management, Case Management, Evidence Framework, Financial Management, System Administration, Verification Engine, Evidence Broker, Provider Management, Outcome Management, Rules Management, Workflow Management, and Universal Access.

The course explains out-of-the-box Merative SPM functionality and outlines the recommended approach to reusing the Merative SPM Platform reference application. This course is designed to provide learners with a high-level functional overview of the main components of Merative SPM 7.X. The course also helps learners to gain practical exposure to typical functional activities required of business analysts on Merative implementation projects.

General Information

Delivery Method: Self-paced.

Audience: This course is intended primarily for BAs who will work on Merative implementation projects. The course is also useful for anyone who needs a general overview of the features and functionality of the Merative SPM Platform 7.X, including testers, project managers, and product administrators.

Topics: The course covers the following topics:

- How the overarching Merative SPM product is structured and the functional interrelationships between its constituent parts.
- The main functional components of the Merative SPM Platform and the respective purpose of each component.
- SPM business process analysis activities.

Learning Objectives:	After completing the course, learners should be able to:

- Identify the main functional components of the Merative SPM Platform V7.X.
- Describe participant, case, administration, and workflow management.
- Explain how rules and evidence are defined and used.
- Describe financial processing and outcome management.
- Describe how evidence verification and brokerage are handled.
- Provide an overview of Merative Universal Access.
- Identify SPM Enterprise Modules.
- Identify SPM Solutions.
- Navigate components that are ready for immediate use in SPM, as well as use the basic functionality.

Prerequisites:	Learners should have a working knowledge of health and human services programs and exposure to and experience of typical business process analysis activities related to system implementations.

Duration:	40 hours

Skill Level:	Basic

Course Agenda

Course Introduction
Duration: 1 hour

Learning objectives:	After completing this lesson, learners should be able to:

- Describe the course objectives
- Outline the course agenda

Lesson 1. Introduction to Merative Social Program Management (SPM)
Duration: 1.5 hours

Learning objectives:	After completing this lesson, learners should be able to:

- Summarize the following areas of Merative Social Program Management (SPM):
  - SPM Approach
  - SPM Platform
  - SPM Enterprise Modules
  - SPM Solutions
  - SPM Modularization

Lesson 2. Merative Social Program Management Platform User Interface (UI)
Duration: 1 hour

Learning objectives:	After completing this lesson, learners should be able to:

	- Identify the three major components of the Merative Social Program Management Platform user interface (UI).
	- Describe the following UI conventions:
	   o Shortcuts Panel
	   o Wizards
	   o Modal Dialogs
	   o Smart Panel
	   o Pods

Lesson 2: Exercise – Merative User Interface
Duration: 0.5 hours

Learning objectives:	After completing this exercise, learners should be able to:
	- Identify the main elements of the Merative SPM Platform user interface and describe their respective purposes.

Lesson 3. Merative Participant Management
Duration: 2 hours

Learning objectives:	After completing this lesson, learners should be able to:
	- Describe participant management. - Navigate participant management screens in the Merative Social Program Management (SPM) Platform. - Identify and explain SPM participant role types.

Lesson 4. Merative Case Management
Duration: 2 hours

Learning objectives:	After completing this lesson, learners should be able to:

	- Discuss how cases are used in Merative SPM.
	- Identify the SPM case types.
	- Describe the processing that is involved in delivering a benefit via a product delivery case.
	- List and describe the main case user roles.
	- Describe how cases are organized and presented in the SPM application.
	- Summarize the life cycles of application cases and product delivery cases.
	- List and describe the following case processing steps:
	   o Nominees
	   o Suspension
	   o Closure
	   o Reactivation
	   o Reassessment

Lesson 4: Exercise – Create and Process SPM Cases
Duration: 1.5 hour

Learning objectives:	After completing this exercise, learners should be able to:
	• Perform the following case management tasks:
	o Create an Integrated Case
	o Create a Product Delivery Case
	o Enter and Activate Case Evidence
	o Enter a Certification Period
	o Check Eligibility
	o Submit, Approve, and Activate the Product Delivery Case
	o Issue a Payment
	o Change Evidence
	o View an Overpayment and Liability

Lesson 5. Merative Evidence
Duration: 1 hours

Learning objectives:	After completing this lesson, learners should be able to:
	• Describe the functionality of the Merative evidence framework.
	• Define key pieces of evidence terminology.
	• List and describe the evidence maintenance functions that the evidence framework provides.

Lesson 6. Merative Financial Management
Duration: 1.5 hours

Learning objectives:	After completing this lesson, learners should be able to:
	• Describe the financial management functionality that processes payments, liabilities, and payments received.
	• List and describe the key financial building blocks in SPM.
	• Identify the three deduction categories.

Lesson 6: Exercise – Receive and Process Payments
Duration: 1 hour

Learning objectives:	After completing this exercise, learners should be able to:
	• Perform the following financial management tasks:
	o Receive a payment from a participant and a payment to a liability
	o Receive a payment from an unregistered source, post the payment to a suspense account, and transfer the payment from the suspense account and allocate it to a liability.

Lesson 7. Merative SPM Administration
Duration: 3 hours

Learning objectives:	After completing this lesson, learners should be able to:
	• List and describe some key features of system administration in SPM.
	• Describe the organization and location structure functionality that SPM provides.
	• List and describe the elements that are used to determine a user's security profile.

Lesson 7: Exercise – View and Maintain Organization, Product, Security, and System Information
Duration: 1.5 hour

Learning objectives:	After completing this exercise, learners should be able to:
	• Perform the following administrative tasks:
	    o View the Organization Structure
	    o Add a User to the Organization Structure
	    o Add a Position to an Organization Unit
	    o Assign a User to a Position
	    o Explore other key areas of Merative SPM Administration

Lesson 8. Merative Verification Engine
Duration: 1.5 hours

Learning objectives:	After completing this lesson, learners should be able to: • Describe the concept of verification in Merative SPM. • List and describe the hierarchy of elements within SPM Verification.

Lesson 9. Merative Evidence Broker
Duration: 1.5 hour

Learning objectives:	After completing this lesson, learners should be able to: • Describe the evidence sharing requirements of SPM agencies and how the Merative Evidence Broker Enterprise Module addresses them. • List and describe the ways in which the Evidence Broker can allow broadcasted evidence to be handled. • Distinguish between identical and non-identical evidence sharing.

Lesson 10. Merative Provider Management
Duration: 1 hour

Learning objectives:	After completing this lesson, learners should be able to: • Describe the purpose of the Provider Management Enterprise Module. • List and describe the key positions that are associated with Provider Management.

Lesson 10: Exercise – Enroll and Administer Providers
Duration: 1 hour

Learning objectives:	After completing this exercise, learners should be able to:
	• Perform the following provider management tasks:
	    o View a Provider
	    o Enroll a Provider
	    o Add Information and Approve your Provider

Lesson 11. Merative Outcome Management
Duration: 1.5 hours

Learning objectives:	After completing this lesson, learners should be able to:
	- Describe Outcome Management and how it can assist an SPM agency in helping its clients to achieve specific outcomes. - Explain how assessments are used to provide a picture of a client's circumstances and to make recommendations. - Build an outcome plan that can help a client to achieve specific outcomes.

Lesson 11: Exercise – Create an Outcome Plan
Duration: 1 hour

Learning objectives:	After completing this exercise, learners should be able to:
	- Perform the following outcome management tasks: - Create an Outcome Plan and Run an Assessment. - Develop the Outcome Plan.

Lesson 12. Merative Rules
Duration: 1.5 hour

Learning objectives:	After completing this lesson, learners should be able to:
	- Describe the roles of, and interrelationship between, rules and evidence in Merative SPM. - Describe the SPM rules definition process. - Provide a high-level overview of the rules maintenance and execution process.

Lesson 12: Exercise – Use the Cúram Express Rules (CER) Editor
Duration: 1 hour

Learning objectives:	After completing this exercise, learners should be able to:
	- Perform the following CER Editor tasks: - Navigate the CER Rules Editor - Create a Simple Rule Diagram

Lesson 13. Merative Workflow
Duration: 1 hour

Learning objectives:	After completing this lesson, learners should be able to:
	- Describe the following components of the Workflow Management System (WMS) in the Merative Social Program Management (SPM) Platform: - Process Definition Tool (PDT) - Workflow Engine - User Inbox - Workflow Administration

Lesson 13: Exercise – Explore Cúram Workflow Functionality
Duration: 1.5 hour

Learning objectives:	After completing this exercise, learners should be able to:
	• Launch the Cúram Workflow administration application and access the following workflow components:
	
	    o Allocation Targets
	    o Work Queues and Tasks
	    o Workflow Processes
	    o Process Instance Errors, Process Instance Search
	    o Workflow Events

Lesson 14. Merative Universal Access
Duration: 1.5 hours

Learning objectives:	After completing this lesson, learners should be able to:
	• Identify the citizen and social program management agency needs that Merative Universal Access addresses.
	• Provide a high-level overview of the following Merative Universal Access components:
	    o Triage
	    o Screening
	    o Application
	    o Citizen Account

Lesson 15. Merative SPM V7.X Business Certification Overview
Duration: 15 minutes

Learning objectives:	After completing this lesson, learners should be able to: • Provide an overview of the SPM V7.X Business Certification Test. • Summarize the process for taking the test.

Course Review and Wrap-Up
Duration: 15 minutes