

## COURSE ABSTRACT

# Introduction to Merative Social Program Management 7.X: Functional Overview

9D75G

**Course Description**

This self-paced course introduces the concept of Social Program Management (SPM), which is the industry segment that Merative targets. Merative offers products that SPM agencies need to provide government-funded social, health, and other services to citizens. The course provides a high-level summary of the Merative SPM Platform and the Merative Application Modules. The course describes the main components of the SPM Platform and the respective functions of the Application Modules. The course explains the SPM Platform and Application Modules by describing their respective functions in the context of the citizen and agency needs that they address. This web-based course has no e-lab associated with it.

**General Information**

**Delivery Method:** Self-paced.

**Audience:** This self-paced course provides learners with a high-level summary of the SPM Platform and the Application Modules.

**Topics:** The course covers the following topics:

- The unique approach that Merative adopts to the requirements of SPM agencies and the needs of their clients.
- The main components of the SPM Platform and how they meet agency requirements and citizen needs.
- The respective features and functionality of the Application Modules and how they meet the specific needs of citizens and SPM agencies.

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

- Describe the Merative approach to SPM.
- Describe the participant management and case management functionality that the SPM Platform provides.
- Describe the financial management functionality that the SPM Platform provides.
- Provide a high-level overview of SPM Intake.
- Identify the different components of SPM Workflow and outline their roles.
- Provide an overview of how communications are handled in SPM.
- List and describe the following Application Modules:
  - Appeals
  - Archiving
  - Business Intelligence and Analytics
  - Child Welfare
  - Evidence Broker
  - Identity Intelligence
  - Income Support
  - Income Support for Medical Assistance
  - Life Event Management
  - Outcome Management
  - Provider Management
  - Social Enterprise Collaboration
  - Universal Access
  - Verification Engine

**Prerequisites:** None

**Duration:** 6 hours

**Skill Level:** Basic

### Unit 1: The SPM Platform – Part One

Lesson 1: Course Introduction

Duration: 5 minutes

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

- Describe the course objectives.

Lesson 2: Merative and Social Program Management (SPM)

Duration: 25 minutes

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

- Provide an overview of Merative and the SPM products that it offers.
- Describe the underlying IBM approach to the requirements of SPM.

Lesson 3: The SPM User Interface

Duration: 20 minutes

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

- List and describe the main components of the IBM SPM Platform user interface.

#### Lesson 4: SPM Platform: Participant Management

Duration: 25 minutes

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

- Explain what a participant is in the context of IBM and the central role that participant functionality plays in case processing.
- List and describe the 11 IBM participant types.

#### Lesson 5: SPM Platform: Case Management

Duration: 25 minutes

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

- Discuss how cases are used in SPM.
- Identify the case types in the SPM Platform.

#### Lesson 6: IBM SPM Platform: Financial Management

Duration: 30 minutes

Learning objectives: After completing this lesson, students 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 7: IBM SPM Platform: Intake

Duration: 20 minutes

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

- Provide an overview of the Intake functionality in the SPM Platform.

### **Unit 2: The IBM SPM Platform – Part Two**

#### Lesson 1: IBM SPM Platform: SPM Administration

Duration: 30 minutes

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

- Describe some key features of system administration in the SPM Platform.

#### Lesson 2: Merative Knowledge Center – SPM Materials

Duration: 15 minutes

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

- Navigate around the Knowledge Center and access SPM product documentation.

#### Lesson 3: IBM SPM Platform: Documentation Analysis Generator

Duration: 15 minutes

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

- Describe the Documentation Analysis Generator tool and the outputs that the tool produces.
- Explain the purpose of the tool.

#### Lesson 4: IBM SPM Platform: SPM Workflow

Duration: 20 minutes

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

- Define the term workflow as implemented by and how it relates to the generic definition of workflow as laid down by the Workflow Management Coalition.

- Outline the benefits of using Workflow to build and manage the workflows that your organization requires.
- Provide high-level overviews of the following Workflow components:
  - Process definitions
  - Process instances
  - Activities
  - Workflow Engine

#### Lesson 5: IBM SPM Platform: Communications

Duration: 20 minutes

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

- Describe how facilitates communications between the participants and the SPM organization.
- List and describe the communication types that the SPM Platform supports.

### Unit 3: The IBM SPM Platform – Application Modules 1

#### Lesson 1: Universal Access

Duration: 30 minutes

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

- Identify the citizen and SPM agency needs that Universal Access addresses.
- Provide a high-level overview of the following Universal Access components:
  - Triage
  - Screening
  - Application
  - Citizen Account

#### Lesson 2: Verification Engine

Duration: 25 minutes

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

- Describe the concept of verification in SPM.
- List and describe the main components of the Verification Engine.

#### Lesson 3: Provider Management

Duration: 25 minutes

Learning objectives: After completing this lesson, students 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 4: Appeals

Duration: 25 minutes

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

- Provide a high-level overview of the appeals processing functionality in the Appeals Enterprise Module.
- Define the roles that the following parties play in an appeal case: Appellant, Respondent, and Third Party.
- List and describe the three appeal types that Appeals provide, namely, Hearing Case, Hearing Review, and Judicial Review.

## Unit 4: The IBM SPM Platform – Application Modules 2

Lesson 1: Social Enterprise Collaboration

Duration: 35 minutes

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

- Outline the purpose of the Social Enterprise Collaboration (SEC) Enterprise Module and describe the citizen and SPM agency needs that the module addresses.
- List and describe the following SEC components:
  - Case and Participant Index (CPI)
  - Multidisciplinary Team (MDT)
  - Social Enterprise Folder (SEF) and the Citizen Context Viewer (CCV)

Lesson 2: Outcome Management

Duration: 30 minutes

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

- Describe Outcome Management and how it helps an SPM agency to achieve better outcomes for its clients.
- Explain how Assessments are used to provide a picture of a client's circumstances and to make recommendations.
- Build an Outcome Plan to achieve positive outcomes.

Lesson 3: Evidence Broker

Duration: 20 minutes

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

- Describe the evidence sharing requirements of SPM agencies and how the 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 4: Business Intelligence and Analytics

Duration: 20 minutes

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

- Describe the BI and Analytics Enterprise Module and identify some of the functional features that are associated with its main components.