Cúram

merative

Fundamentals of the Merative Cúram Platform for Business Analysts 8.X

CUR088

Course Description

This self-paced course introduces the fundamentals of the Merative Cúram Platform. It introduces the key components of Cúram, namely, Universal Access, User Interface, Participant Management, Case Management, Evidence Framework, Financial Management, Administration, Verification Engine, Evidence Broker, Provider Management, Outcome Management, Rules Management, and Workflow Management.

The course discusses out-of-the-box Cúram functionality and illustrates how it can be implemented by Social Services organizations and related agencies. This course is designed to familiarize learners with the main components of Cúram 8.X and explain how they fit together to support organizational processes.

General Information

Delivery Method: Self-paced.

Audience: This course is intended primarily for Business Analysts (BAs) who work on Cúram implementation projects. The course is also useful for anyone who needs an overview of the features and functionality of the Merative Cúram Platform 8.X, including testers, project managers, and administrators. In general, the contents of the course are relevant to a wider audience than BAs and will help members of that wider audience to collaborate effectively on Cúram implementation projects.

Topics: The course covers the following topics:

- How the overarching Cúram suite of products is structured and the functional interrelationships between the constituent parts.
- The main functional components of the Cúram Platform and their respective purposes.
- The end-to-end process that Cúram supports, enabling citizens to apply for benefits and services and social services organizations to provide them.

Learning Objectives: After completing the course, learners should be able to:
- Identify the main functional components of the Cúram Platform V8.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 Cúram Universal Access.
- Identify and describe Cúram Modules.
- Navigate components that are ready for immediate use in Cúram, as well as use its basic functionality.

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

Duration: 40 hours approximately. This is an estimated completion time that consists of the lesson timings below and added time for revision and interruptions. The estimate also tries to account for the fact that each leaner will work at their own pace.

Skill Level: Basic

Course Agenda

Course Introduction
Duration: 0.5 hours
Learning objectives:

After completing this lesson, learners should be able to:
- Describe the course objectives
- Outline the course agenda

Lesson 1. Introduction to Cúram
Duration: 2 hours
Learning objectives:

After completing this lesson, learners should be able to:
- Summarize the following areas of Cúram:
  - Cúram Approach to Managing Social Programs
  - Cúram Platform
  - Application Modules
  - Universal Access
  - Cúram Process

Lesson 1: Exercise – Universal Access (Citizen-Facing)
Duration: 0.75 hours
Learning objectives:

After completing this exercise, learners should be able to:
- Login to the Universal Access Web Application as a citizen
- Apply for the Employment Benefit sample product.

Lesson 2. Cúram User Interface (UI)
Duration: 1 hour

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

Learning objectives:

After completing this lesson, learners should be able to:
- Identify the three major components of the Cúram UI.
- Describe the following UI conventions:
    o Modal Dialogs
    o Wizards
    o Smart Panel
    o Pods

Lesson 2: Exercise – Cúram User Interface (UI)
Duration: 0.5 hours

Learning objectives: After completing this exercise, learners should be able to:
- Identify the main elements of the Cúram UI and describe their respective purposes.

Lesson 3. Cúram Participant Management
Duration: 1.25 hours

Learning objectives:

After completing this lesson, learners should be able to:
- Describe participant management.
- Navigate the participant management screens in the Cúram Platform.
- Identify and explain participant role types.

Lesson 3: Exercise – Participant Management
Duration: 0.75 hours

Learning objectives:

After completing this exercise, learners should be able to:
- Identify and use some essential Participant Management functionality
- Register a Person
- Update a Person's Information
- View Other Participant Types

Lesson 4. Cúram Case Management
Duration: 2 hours

Learning objectives:

After completing this lesson, learners should be able to:
- Discuss how cases are used in Merative Cúram.
- Identify the main Cúram 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 Cúram application.
- Summarize the life cycles of application cases and product delivery cases.
- List and describe the following case processing concepts:
    o Nominees
    o Suspension
    o Closure
    o Reactivation
    o Reassessment

Lesson 4: Exercise – Create and Process Cúram Cases
Duration: 1.5 hours

Learning objectives:

After completing this exercise, learners should be able to:
- Perform the following case management tasks:
    - Authorize Application case.
    - Create Integrated case.
    - Create Product Delivery case and payment.
    - Process a Change of Circumstances.

Lesson 5. Cúram Evidence
Duration: 1 hours

Learning objectives:

After completing this lesson, learners should be able to:

- Describe the functionality of the Cúram evidence framework.
- Define key pieces of evidence terminology.
- List and describe the evidence maintenance functions that the evidence framework provides.

Lesson 6. Cúram 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 Cúram.
- 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:
    - Receive a payment from a participant and a payment to a liability.
    - 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. Cúram 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 Cúram.
- Describe the organization and location structure functionality that Cúram 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 hours
Learning objectives: After completing this exercise, learners should be able to:
- Perform the following administrative tasks:
    - View the Organization Structure
    - Add a User to the Organization Structure
    - Add a Position to an Organization Unit
    - Assign a User to a Position
    - Explore other key areas of Cúram Administration

Lesson 8. Cúram Verification Engine
Duration: 1.5 hours
Learning objectives: After completing this lesson, learners should be able to:
- Describe the concept of verification in Cúram.
- List and describe the hierarchy of elements within the Verification Engine.

Lesson 8. Cúram Verification Engine Exercise
Duration: 0.5 hours

Learning objectives: After completing this exercise, learners should be able to:
- Explore Configured Verifications in the Cúram application.

Lesson 9. Cúram Evidence Broker
Duration: 1.5 hours
Learning objectives: After completing this lesson, learners should be able to:
- Describe the evidence sharing requirements of social program agencies and how the Evidence Broker application module addresses them.
- List and describe the ways in which the Evidence Broker can handle broadcasted evidence.
- Distinguish between identical and logically equivalent evidence sharing.

Lesson 9. Cúram Evidence Broker
Duration: 0.5 hours
Learning objectives:
After completing this exercise, learners should be able to:
- Explore some of the features and components that underpin the evidence sharing in the Evidence Broker.

Lesson 10. Cúram Provider Management
Duration: 1 hour
Learning objectives: After completing this lesson, learners should be able to:
- Describe the purpose of the Provider Management application 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:
  - View a Provider
  - Enroll a Provider
  - Add Information and Approve your Provider

Lesson 11. Cúram Outcome Management
Duration: 1.5 hours

Learning
objectives:

After completing this lesson, learners should be able to:

- Describe how Outcome Management can assist a social program 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.

Lesson 12. Cúram Rules
Duration: 1.5 hours

Learning
objectives:

After completing this lesson, learners should be able to:

- Describe the roles of respective rules and evidence in Cúram and the interrelationship between the two roles.
- Describe the Cúram rules definition process.
- Summarize the rules maintenance and execution process.

Lesson 12: Exercise – Use the Cúram Express Rules (CER) Editor
Duration: 0.5 hours

Learning
objectives:

After completing this exercise, learners should be able to:
- Navigate the CER Rules Editor

Lesson 13. Cúram 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 Cúram Platform:
  - Process Definition Tool (PDT)
  - Workflow Engine
  - User Inbox
  - Workflow Administration

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

Learning
objectives:

After completing this exercise, learners should be able to:
- Launch the Cúram Workflow administration application and access the following workflow components:

  - Allocation Targets
  - Work Queues and Tasks
  - Workflow Processes

- o   Process Instance Errors, Process Instance Search
- o   Workflow Events

Lesson 14. Universal Access
Duration: 1.5 hours

Learning
objectives:

After completing this lesson, learners should be able to:

- Identify the citizen and social program agency needs that Cúram Universal Access addresses.
- List and describe the following Universal Access components:
  - o   Screening
  - o   Application
  - o   Citizen Account

Lesson 14: Exercise – Universal Access (Caseworker-Facing)
Duration 0.5 hours

Learning
objectives:

After completing this exercise, learners should be able to:

- Identify the internal caseworker-facing Universal Access components that underpin the functions that citizen-facing access via the Universal Access external app .