COURSE ABSTRACT

Merative Cúram Citizen Engagement Server-Side for Developers

CUR104

Course Description

This course provides learners with the technical skills needed to configure and customize server-side features of the Merative Cúram Citizen Engagement solution.

Citizen Engagement allows individuals to explore and apply for relevant programs and manage their interactions with agencies through citizen accounts. It includes both server-side components—such as the Universal Access Application Module—and the client-side assets Cúram Design System and UA Web App.

Throughout the course, learners will gain hands-on experience with the server-side configuration and technologies that support Citizen Engagement, but also internal screening and program applications that are performed by caseworkers. They will also learn how to tailor out-of-the-box components to meet specific agency requirements. Learners will design and implement a simple end-to-end application that enables citizens to perform eligibility screening, program application, and view their benefits via the citizen account.

General Information

Delivery Method: Classroom/Instructor-Led Training (ILT) and self-paced with lab.

Audience: This intermediate-level course is aimed at technical staff who will configure the server-side features of Citizen Engagement.

Topics: The course covers the following topics:

- The functions and features of Citizen Engagement.
- Configuring Citizen Engagement/Universal Access features.
- Configure data and PDF form mapping.
- Customize Universal Access features.

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

- Use Merative Citizen Engagement features.
- Configure Screening.
- Configure Program Application and Intake.
- Map application data to entities and PDF forms.
- Configure Citizen Account.
- Configure Life Events.
- Customize Cúram Universal Access features and provided artifacts compliantly.
- Outline the security features of Cúram Universal Access.
- Troubleshoot configuration issues.

Prerequisites: Learners must have completed *Merative Cúram Technical Overview* before taking this course. An understanding of Intelligent Evidence Gathering (IEG), Cúram Express Rules (CER), and Cúram REST APIs is useful, but not essential, before taking this course. However, you should take courses in these topics to complete your understanding of Citizen Engagement Server-Side development.

Duration: Approx. 20 to 24 hours self-paced or 3 days instructor led.

Skill Level: Intermediate

Badge: Learners can earn a badge by successfully completing a quiz and configuring a feature in a lab environment.

Version: This course was initially developed for Cúram 8.1.3. The course covers core concepts that do not change much from version to version. Relevant new features that have been introduced since the course was first published will be included in the Addendum to the course.

Note

- The course duration gives learners an estimate of how much time they need to allocate to the course. The course duration does not specify the actual time required to complete the course, which varies by learner. The course agenda shows the schedule for a classroom (ILT) delivery. Additional time is allowed for daily reviews and exercise reviews. Learners taking this course in a self-paced environment should allow more time to complete exercises.

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Course Agenda

Unit 1 – Introduction to Citizen Engagement

Lesson 1 – Course Introduction

Duration: 10 minutes

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

- List the course objectives.
- Outline the course format and resources.

Lesson 2 – Citizen Engagement and Universal Access Introduction

Duration: 35 minutes

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

- Outline how the Citizen Engagement solution meets citizen and agency needs.
- Describe the main features of Universal Access.
- Summarize the technical architecture of Universal Access.
- List example implementations that use Universal Access.
- Perform screening, online applications, and intake.
- Access the Citizen Account.

Exercise 1 – Use Universal Access Features

Duration: 50 minutes

Lesson 3 – Overview of Schemas, Scripts, and Rules

Duration: 40 minutes

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

- State the purpose of the following technologies
  - Cúram Datastore (CDS).
  - Intelligent Evidence Gathering (IEG).
  - Cúram Express Rules (CER).
- Outline the tools that are used to develop schemas, scripts, and CER rules.
- Describe how Universal Access uses schemas, scripts, and rules during the screening process.

Exercise 2 – Access a Schema, Script, and Rule Set

Duration: 40 minutes

Lesson 4 – Developing Citizen Engagement Solutions

Duration: 25 minutes

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

- Outline the front-end development tasks.
- List the artifacts that are developed to support backend features.
- Summarize the steps for developing IEG scripts and rules.

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- Provide a high-level overview of the development environment.

Exercise 3 – Design a Solution for a Simple Scenario
Duration: 35 minutes

Unit 2 – Configuring Screening and Application

Lesson 1 – Screen
Duration: 25 minutes

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

- Outline how Universal Access performs screening.
- Explain the steps for configuring screening.
- List system properties for screening.
- Configure screening.

Exercise 4 – Configuring Screening
Duration: 60 minutes

Lesson 2 – Apply (Manual)
Duration: 20 minutes

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

- Explain the options when applying for programs.
- List the steps for configuring manual applications.
- Configure a PDF form for a program.
- Configure local offices and service areas.

Exercise 5 – Configure Service Areas and a PDF Form
Duration: 40 minutes

Lesson 3 – Apply (Online)
Duration: 25 minutes

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

- Describe how citizens apply for programs online.
- List the steps for configuring online applications.
- Describe how to configure application information.
- Explain the purpose of PDF form mapping and evidence mapping.
- List the system properties for online applications.
- Configure an online application.

Exercise 6 – Configure an Online Application
Duration: 30 minutes

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Unit 3 – Configuring Intake

Lesson 1 – Cases and Evidence Types

Duration: 25 minutes

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

- State the main case types used by Cúram.
- Explain how evidence is associated with cases.
- Define an Evidence Type by using the Dynamic Evidence Editor.
- Associate an Evidence Type with cases.
- Define evidence sharing.

Exercise 7 – Configure Evidence Type and Cases

Duration: 40 minutes

Lesson 2 – Intake

Duration: 50 minutes

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

- Explain the application intake process.
- Describe how to configure person search and match.
- Describe the authorization process.
- State the purpose of workflows for application intake.
- List system properties for application intake.
- Configure intake.

Exercise 8 – Configure Intake

Duration: 30 minutes

Unit 4 - Configuring Data Mapping

Lesson 1 – Data Mapping Overview

Duration: 35 minutes

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

- State the purpose of data mapping.
- Outline how data mapping operates.
- Describe the steps for configuring data mapping.
- List information sources for data mapping.
- Configure mapping to evidence entities.

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Exercise 9 – Configure Mapping to Evidence Entities
Duration: 45 minutes

Lesson 2 – Mapping Specifications
Duration: 25 minutes

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

- State the purpose of mapping specifications.
- Explain how to define mapping specifications.
- Interpret a mapping specification.

Exercise 10 – Review a Mapping Specification
Duration: 20 minutes

Lesson 3 – Mapping Configurations
Duration: 35 minutes

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

- Outline how data is mapped to a PDF form.
- Outline how to write a mapping configuration.
- Configure mapping to a PDF form.

Exercise 11 – Configure Mapping to a PDF Form
Duration: 30 minutes

Unit 5 - Configuring Additional Features

Lesson 1 – Track
Duration: 30 minutes

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

- List the features provided by Citizen Account.
- Outline how to create citizen accounts.
- List the type of information that is displayed on the Dashboard page.
- Customize account messages.
- Describe how to configure the payments and notices pages.

Exercise 12 - Customize a Notification Message
Duration: 30 minutes

Lesson 2 – Verify and Appeal
Duration: 25 minutes

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

- Outline how the Verify feature operates in the UA Web App.
- Describe how citizens and caseworkers use the Verify feature.
- List the options for configuring and customizing Verifications.
- Outline how Appeals operates in the UA Web App.
- List the options for configuring and customizing Appeals.

Exercise 13 - Explore Verification Configuration
Duration: 20 minutes

Lesson 3 – Update
Duration: 40 minutes

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

- Outline how Standard Life Events operate.
- Distinguish between Standard and Round-Tripping Life Events.
- List considerations when building Life Events.
- Describe the steps for developing simple Life Events.
- Outline how Round-Tripping Life Events operate.

Exercise 14 - Explore Life Events
Duration: 30 minutes

Unit 6 – Development Approach

Lesson 1 – Additional Development Tasks
Duration: 25 minutes

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

- Outline the overall approach for developing backend solutions.
- Distinguish between configuration and customization.
- Extract configuration data.
- Describe how SOAP and RESTful web services are used for integration.
- View Cúram REST APIs in Swagger.

Exercise 15 - View REST APIs
Duration: 30 minutes

Lesson 2 – Customizing Universal Access Features
Duration: 30 minutes

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

- List the Universal Access artifacts that can be customized.
- Outline the customization techniques.
- Access JavaDoc to understand Universal Access APIs.
- List the customization points for screening, application and intake.
- Customize the generic PDF form.

Exercise 16 - Customize the Generic PDF

Duration: 30 minutes

Lesson 3 – Security

Duration: 25 minutes

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

- List the security features for Universal Access.
- Describe how to secure REST APIs.
- Outline the authentication mechanisms in Universal Access.
- List system properties for configuring account security.
- Outline how authorization is implemented.

Exercise 17- Review Account Security

Duration: 20 minutes

Lesson 4 – Troubleshooting and Support

Duration: 20 minutes

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

- List tips for testing Universal Access.
- Outline the release strategy and software version numbering.
- List tips for troubleshooting Universal Access.
- Capture troubleshooting data.
- State the importance of purging data.

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