

IBM Social Program Management V8.0.0

Deep Dive: Case Overview and Entitlements Card



Agenda

Problem Background

Solution Outline

Demonstration

Technical Foundation

Where to Find More Information



Maria and Emma



Maria

Citizen, Client
Currently Receives Support

Working part-time and looking for additional employment

Eligible for and receives support from an agency



Emma

Benefit Delivery Caseworker

An experienced mid-level caseworker in a government agency

Works with citizens who are seeking income support

Background – Citizen



Citizens frequently ask caseworkers questions about benefit payments.

Maria contacts the agency with a series of questions to find out more about her benefit entitlement.

- What's my next payment amount?
- When will I get that payment?
- How much should I receive monthly?

Background – Caseworker



The SPM Platform contains the data required to address the questions that caseworkers frequently receive from citizens.

Citizens often receive assistance from multiple benefits, which means that caseworker Emma must navigate through several screens to find the information that she needs.

To answer Maria's questions, Emma needs to perform the following tasks:

- Find information within the case
- Navigate to review multiple sources
- Collate information to answer entitlement-related questions

Solution – Case Overview and Entitlements Card



V8.0.0 enables faster information access for Emma and supports her in getting case context.

The new Case Overview has a configurable Entitlements card that provides key financial and entitlement information that helps Emma answer frequently asked questions about a citizen's benefits.

Single location showing key case information from any benefit within an integrated case

Single location showing case details and key financial data from multiple sources within the benefit case

Navigation links to guide the caseworker and enable them to dig into the details

Benefits to display on the card are configurable

Scenario



Maria reports a change of circumstance.

She also has questions about the impact to her benefit payments.

Maria works part-time and is looking for additional employment.

Due to her low income, she is eligible for and in receipt of financial assistance from the agency.

Maria's employer recently reduced her working hours, which also reduced Maria's income from \$100 to \$80 per week.

Maria contacts the agency to report this change in circumstances and provides payslips to verify.

Maria wants to know how this will affect her entitlements.

Emma takes the call to deal with her query.

Solution Demonstration



Emma needs to

- Get up to speed on the case
- Answer Maria's questions and process any changes required



New Case Overview Entitlements Card

The screenshot displays the IBM Social Program Management interface. At the top, there is a navigation bar with 'Home', 'Cases and Outcomes', 'Inbox', and 'Calendar'. A search bar on the right contains the text 'Enter Name or Ref. Number or Keywo' and a magnifying glass icon. The user is identified as 'Welcome CASE WORKER'. Below the navigation bar, there are tabs for 'Person Search', 'Maria Hernandez', 'Social Assistance 257 - Maria Hernandez', and 'Employment Benefit 258 - Maria Hernandez'. The main content area is titled 'Social Assistance - Maria Hernandez' and features a profile picture of Maria Hernandez, her name, and the text 'Primary | 23 years'. To the right of the profile, there are two status indicators: 'Open (0) Items to Verify' and '(0) Evidence In Edit', along with a 'CASE WORKER' button. Below the profile, there is a horizontal menu with options: Home, Overview (selected), Evidence, Participants, Assessments, Services, Referrals, Outcome Plans, Contact, Events, Tasks, Issues and Proceedings, and Administration. The 'Overview' section is active, showing an 'Entitlements' card. The card displays 'Expected next payments' as '\$135.00 (due 9/13/2021)'. Below this, a table lists the entitlements:

Programs	Members	Expected next payments
Employment Benefit - 258	Maria Hernandez	\$135.00 (due 9/13/2021)

New Case Overview Entitlements Card

Home **Overview** Evidence Participants Assessments Services Referrals Outcome Plans Contact Events Tasks Issues and Proceedings Administration

Overview

Expected next payments
\$135.00 (due 9/13/2021)

Programs	Members	Expected next payments
^ Employment Benefit - 258	Maria Hernandez	\$135.00 (due 9/13/2021)
Start date 8/26/2021	Delivery schedule Maria Hernandez, Income Assistance, Weekly by Check in Advance on a Monday	Expected next payments \$135.00 (due 9/13/2021)
Case status Active	Entitlement \$135.00 (8/30/2021 - 2/23/2022) Updated (8/30/2021)	Previous payments \$135.00 (due 9/6/2021)
Case owner CASE WORKER	View determination history →	View payments →

Is there any
change to my
entitlement
payment?



Entitlements Card – Adjustment Indicator

Home **Overview** Evidence Participants Assessments Services Referrals Outcome Plans Contact Events Tasks Issues and Proceedings Administration

Overview ↻ 🖨 ?

Entitlements Expected next payments
\$145.00 (due 9/13/2021)

Programs	Members	Expected next payments
▼ Employment Benefit - 258	Maria Hernandez	\$145.00 Adjusted (due 9/13/2021)

Payment Adjustment Indicator

Entitlements Card – Updated Entitlement

Overview



Entitlements

Expected next payments
\$145.00 (due 9/13/2021)

Programs	Members	Expected next payments
^ Employment Benefit - 258	Maria Hernandez	\$145.00 Adjusted (due 9/13/2021)
Start date 8/26/2021	Delivery schedule Maria Hernandez, Income Assistance, Weekly by Check in Advance on a Monday	Expected next payments \$145.00 (due 9/13/2021)
Case status Active	Entitlement \$145.00 (9/6/2021 - 2/23/2022) Updated (9/6/2021)	Income Assistance ▲ \$145.00 (9/13/2021 - 9/19/2021)
Case owner CASE WORKER	View determination history →	Previous payments \$135.00 (due 9/6/2021)
		View payments →

Entitlement Update

Payment Details

Further Change of Circumstances – More Complex Scenario



Maria is diagnosed with asthma and provides Emma with documentation for the new medical expenses that she now has.

Emma applies these changes immediately.

This change of circumstances leads to a benefit with multiple components and a more complex scenario for Emma to understand and explain to Maria.

Complex Case – At a Glance Information

Home **Overview** Evidence Participants Assessments Services Referrals Outcome Plans Contact Events Tasks Issues and Proceedings Administration

Overview

Expected next payments
\$155.00 (due 5/24/2021)

Programs	Members	Expected next payments
Employment Benefit - 258	Maria Hernandez	\$155.00 Adjusted (due 5/24/2021)

Start date 5/19/2021	Delivery schedule Maria Hernandez, Income Assistance, Weekly by Check in Advance on a Monday	Expected next payments \$155.00 (due 5/24/2021)
Case status Active	Maria Hernandez, Medical Assistance, Weekly by Check in Advance on a Monday	
Case owner CASE WORKER	Entitlement \$155.00 (5/20/2021 - 11/16/2021) Updated (5/20/2021)	

[View determination history](#) →

Expected next payments \$155.00 (due 5/24/2021)	Previous payments \$7.00 (due 5/20/2021)
View payments →	

Updated Next Payment

Nominees

Multiple Components

Delivery Patterns

Non-Standard Previous Payment

Complex Case – Next Payment Section

Expected next payments

\$155.00 Adjusted (due 5/24/2021)

Expected next payments ^
\$155.00 (due 5/24/2021)

Medical Assistance
\$10.00 (5/24/2021 - 5/30/2021)

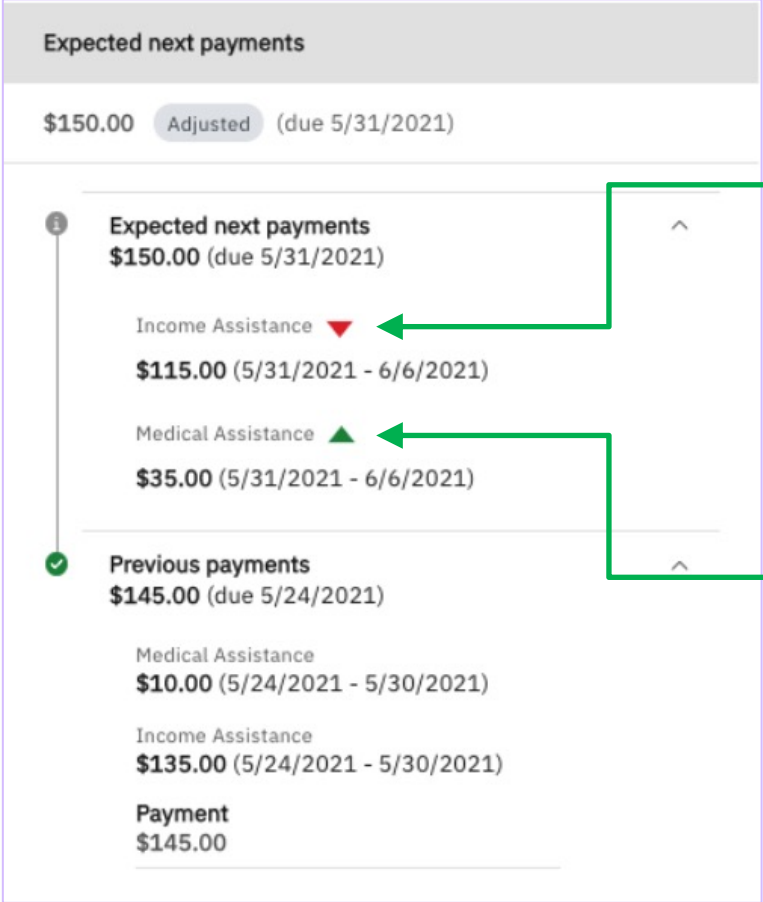
Income Assistance
\$145.00 (5/24/2021 - 5/30/2021)

Previous payments v
\$7.00 (due 5/20/2021)

[View payments](#) →

Multiple Next
Payment Components

Complex Case – Payment Change Indicators



Red arrow shows a reduction in the payment.

Green arrow indicates that the next payment for Medical Assistance of \$35 will be greater than the previous payment of that type.

Complex Case – Handling Multiple Benefits

Overview

Entitlements

Expected next payments **\$352.00 (due 6/1/2021)**

Programs	Members	Expected next payments
Cash Assistance - 264	Shyam New, Child test	Suspended
Start date 5/18/2021	Entitlement \$171.00 (5/18/2021 - 5/31/2021)	Previous payments \$0.00 (due 5/1/2021)
Case status Suspended	View determination history →	Benefit Amount \$171.00 (5/18/2021 - 5/31/2021) Payment canceled
Case owner ELIGIBILITY WORKER		View payments →
Food Assistance - 265	Shyam New, Child test	\$352.00 (due 6/1/2021)
Start date 5/18/2021	Delivery schedule Shyam New, Benefit Amount, Monthly	Expected next payments \$352.00 (due 6/1/2021)
Case status Active	Entitlement \$158.00 (5/18/2021 - 5/31/2021)	Benefit Amount \$352.00 (6/1/2021 - 6/30/2021)
Case owner ELIGIBILITY WORKER	View determination history →	Previous payments \$0.00 (due 5/1/2021)
		Benefit Amount \$158.00 (5/18/2021 - 5/31/2021) Payment canceled

Calculated Total Next Payment

Expected next payments
\$352.00 (due 6/1/2021)

Suspended Case Tag

Multiple Benefits

Payment Cancellation Indicators

Complex Case – Deductions

Tax Deduction



Previous payments

\$286.20 (due 5/1/2021)

Benefit Amount

\$318.00 (5/6/2021 - 5/31/2021)

Deductions

- \$31.80 (Tax Payment)

Payment

\$286.20

Third-Party Deduction

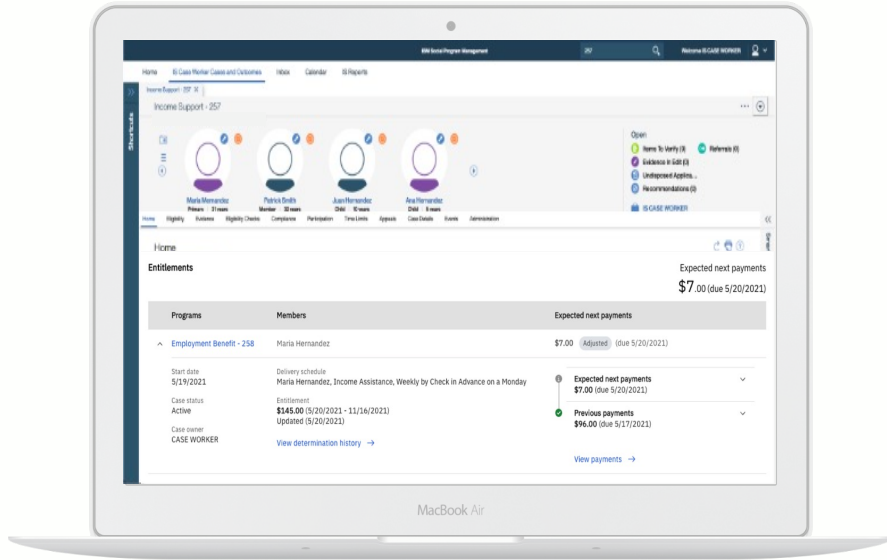
Deductions

- \$15.00 (Tax)

- \$15.00 (Electricity)

- \$9.00 (Gas)

Case Overview and Entitlements Card



High-level information about eligibility, entitlements, and payments across multiple benefits on a case.

Details about the latest payment and expected next payment.

Drill-down of payment summaries to see the benefit components, deductions, and any overpayments or underpayments.

Links available from this central location to quickly access more details.

Case Overview and Entitlements Card

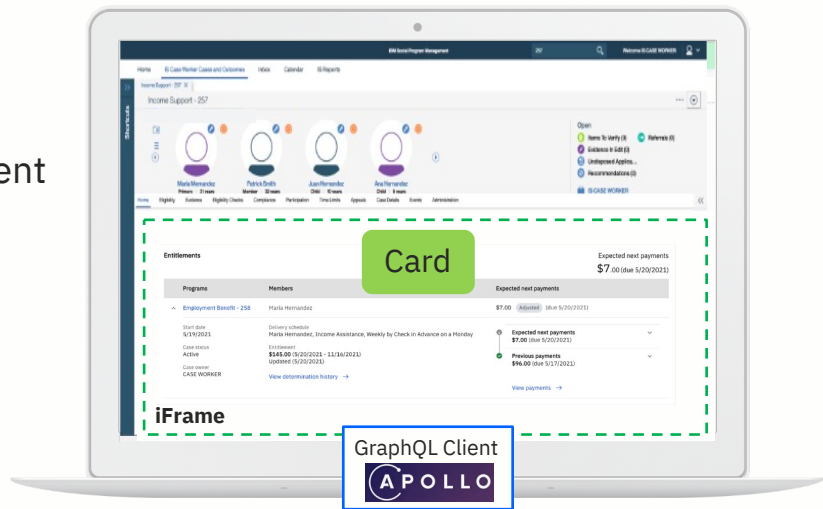
Technical Details



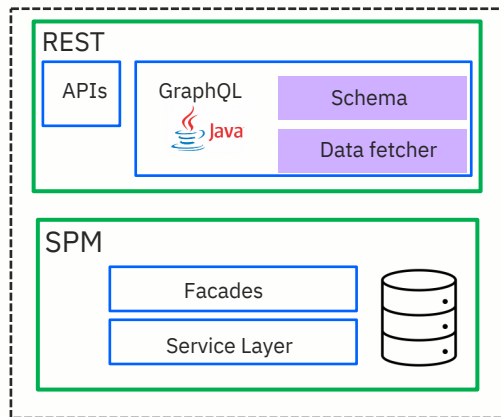
Technical Solution Details

- The Entitlement card is an SPM JavaScript component that is based on Carbon.
- GraphQL is used to fetch data from the server.
- GraphQL is implemented by Apollo (client) and the GraphQL Java library (server).
- In GraphQL, queries request data based on schemas, which is provided by data fetchers.
- A configuration file links the data types to the data fetcher classes.

Client



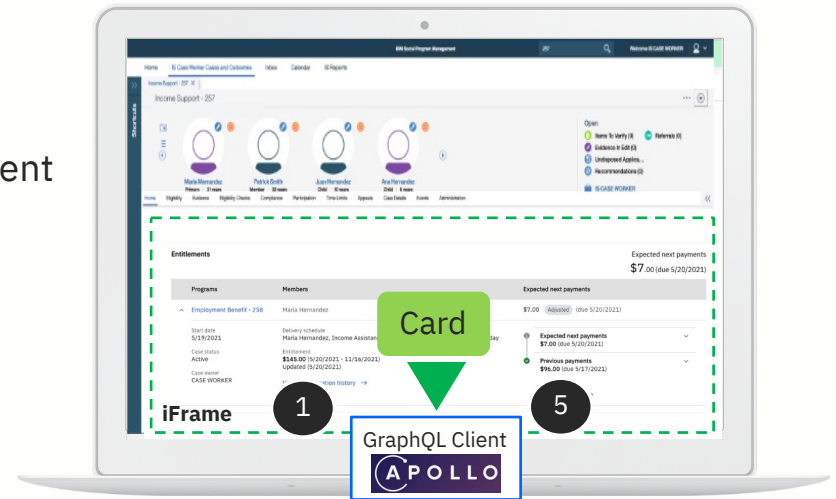
Server



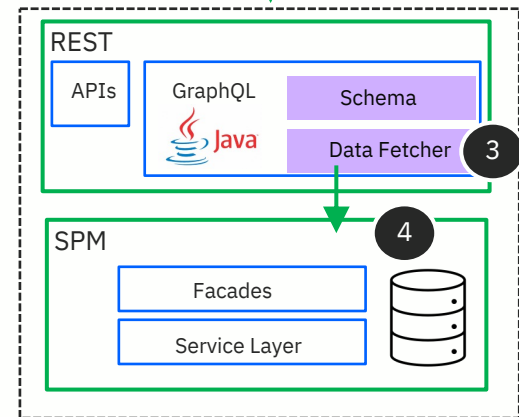
Technical Solution Details

1. The Entitlement card makes a request to the GraphQL client.
2. The GraphQL client library makes a HTTP request to the GraphQL backend server to get the data.
3. The GraphQL data fetchers make direct calls to the Façade layer by using the existing Text Helper infrastructure.
4. The facades return the data.
5. The results of the query are returned to the client and displayed in the card.

Client



Server



Available Configurations

There are several configurable options available for the Case Overview tab and the Entitlements card.

The options are configured in an XML configuration file specific to Case Overview.

Define an XML file for each Integrated Case and load it to the OVERVIEWTABCONFIG database table. A sample XML configuration file is provided in the documentation.

The XML configuration file can be modified and then re-uploaded to SPM for those configurations to take effect.

- Enable and disable the Case Overview feature for the integrated case
- Configure the Integrated Cases to display the overview
- Configure the programs that will display on the Entitlements card
- Modify navigation links from the overview for quick access

XML Configuration

Configure the Integrated Case to display the overview

Enable and disable the Case Overview feature

```
<overview-tab-config>  
  <case-type-code>CT5</case-type-code>  
  <product-category-code>PC4000</product-category-code>  
  <show-overview-tab>true</show-overview-tab>  
</overview-tab-config>  
  
<cards>  
  <card>  
    <card-name>Entitlements</card-name>  
    <product-delivery-cases>  
      <product-delivery-case>  
        <product-delivery-case-name>PN4100</product-delivery-case-name>  
      </product-delivery-case>  
    </product-delivery-cases>  
  </card>  
</cards>
```

Home Overview Evidence Participants Assessments Ser

Overview

Entitlements

Programs	Members
Employment Benefit - 258	Maria Hernandez

Start date: 5/19/2021
Case status: Active
Case owner: CASE WORKER

Delivery schedule: Maria Hernandez, Income Assistance, Weekly by Check in Advance on a Monday
Entitlement: \$145.00 (5/20/2021 - 11/16/2021)
Updated (5/20/2021)
[View determination history](#)

Expected next payments: \$145.00 (due 5/24/2021)
Income Assistance: \$145.00 (5/24/2021 - 5/30/2021)

Previous payments: \$7.00 (due 5/20/2021)
Benefit Underpayment: + \$7.00 (One-off payment)
Payment: \$7.00

[View over and under payments](#)

[View payments](#)

Configure the programs to display

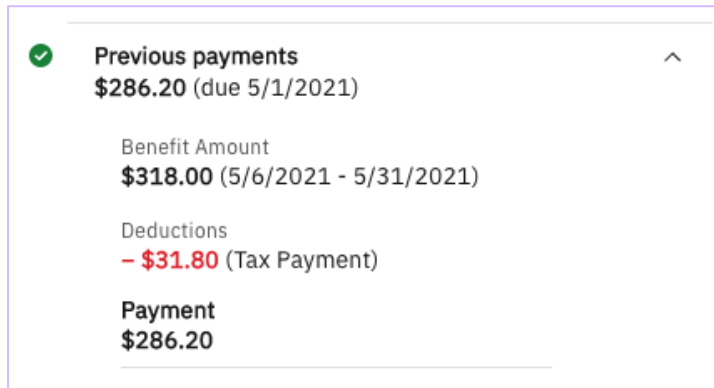
Modify the navigation links

```
<links>  
  <navigation-link>  
    <name>home</name>  
    <uim-page>CREOLECA_productDeliveryHome</uim-page>  
  </navigation-link>  
</links>
```

Available Customizations

Modify Text Label Values

Follow the standard process for changing text in the application by modifying properties files.



A screenshot of a payment summary card. The card has a green checkmark icon in the top left corner. The main heading is "Previous payments" followed by the total amount "\$286.20 (due 5/1/2021)". Below this, there are three sections: "Benefit Amount" with "\$318.00 (5/6/2021 - 5/31/2021)", "Deductions" with "- \$31.80 (Tax Payment)", and "Payment" with "\$286.20". A small upward-pointing chevron icon is in the top right corner of the card.

✓	Previous payments \$286.20 (due 5/1/2021)	^
	Benefit Amount \$318.00 (5/6/2021 - 5/31/2021)	
	Deductions - \$31.80 (Tax Payment)	
	Payment \$286.20	

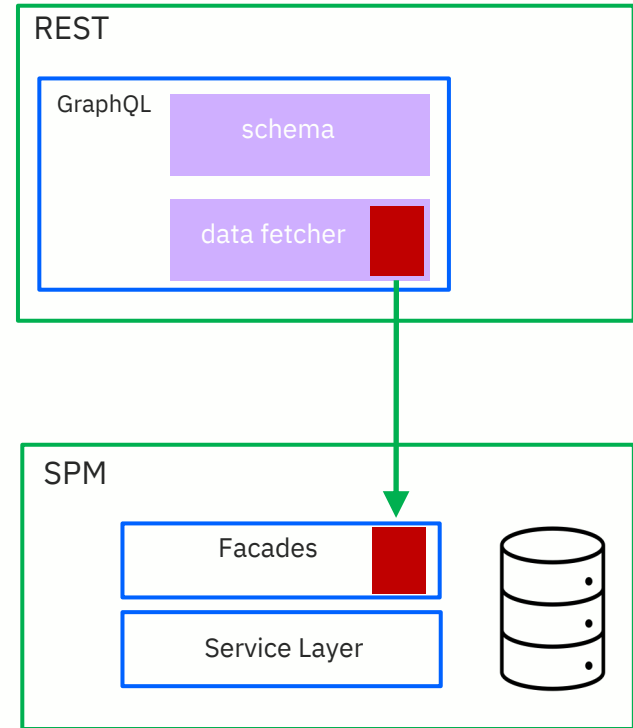
Modify GraphQL Data Sources

The card expects data in a defined format, so you cannot change the schema.

However, you can customize the data fetcher to repoint to a custom façade.

Customizing Data Sources

1. Identify the schema elements to customize
 2. Define your custom façade
 3. Create a custom data fetcher class
 4. Wire the schema element to the custom façade
 5. Build
- See *Customizing data sources for the Entitlements card* for details.



Upgrading

- The feature is disabled by default, which means that there are no upgrade impacts.
- To use the Case Overview feature, you must complete the following steps:
 - Enable GraphQL by setting `curam.graphql.endpoint.enabled` to true
 - Configure which integrated case types show the Overview tab and Entitlements card
 - Configure which programs to show on the Entitlements card
 - Configure the links on the Entitlements card
 - If needed, customize the sources of data for the Entitlements card
- When the feature is configured and enabled, the table OVERVIEWTABCONFIG is created to store the configuration that you defined in your XML file.

Where to Find More Information

Product Documentation:

- Cúram Integrated Case Management
 - See *Ongoing case management – The case overview*
- Configuring Integrated Case Management
 - See *Configuring ongoing case management - Configuring the case overview*



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