

# Caseworker productivity 8.0.3

Enablement material

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Hello and welcome to this deep dive presentation that introduces the caseworker productivity enhancements that are available in Merative Social Program Management (SPM) V8.0.3

Who do we serve



Tiana Green  
Child Welfare Caseworker







Emma Harris  
Delivery of Benefits Caseworker

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To understand the enhancements in SPM V8.0.3, we need to refocus on the people that we serve - caseworkers like Tiana and Emma. Tiana is a child welfare caseworker who spends a lot of time using the application to write up notes and contacts about her vulnerable clients. Emma is a benefit caseworker who works with clients to deliver essential benefits and spends a lot of time working with cases and evidence.

Enhancement summary

 <p><b>Actions menu improvement</b></p> <p>Surface menu actions, reducing caseworker cognitive load and reducing clicks per task.</p> <p>Configurable application wide and customizable at a UIM level.</p>	 <p><b>Autorecovery</b></p> <p>Autorecovery ensures that any data the user enters will not be lost in the event of a system interruption.</p> <p>Available application wide on all standard UIM pages.</p>	 <p><b>Editable notes and contact logs</b></p> <p>The text of notes or narratives can be edited in place by the author of the note or contact log up to a pre-configured period allowing them to come back to a note or narrative to complete it at a more convenient time.</p>	 <p><b>Contact log subject &amp; enhanced search</b></p> <p>A subject can be optionally captured as part of a contact log to provide a meaningful overview of the contact being written about.</p> <p>Contacts can also be retrieved later by searching for specific text or phrase within a contact log narrative or subject.</p>
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For SPM 8.0.3 there are 4 major enhancements being added which improve a caseworker's productivity.

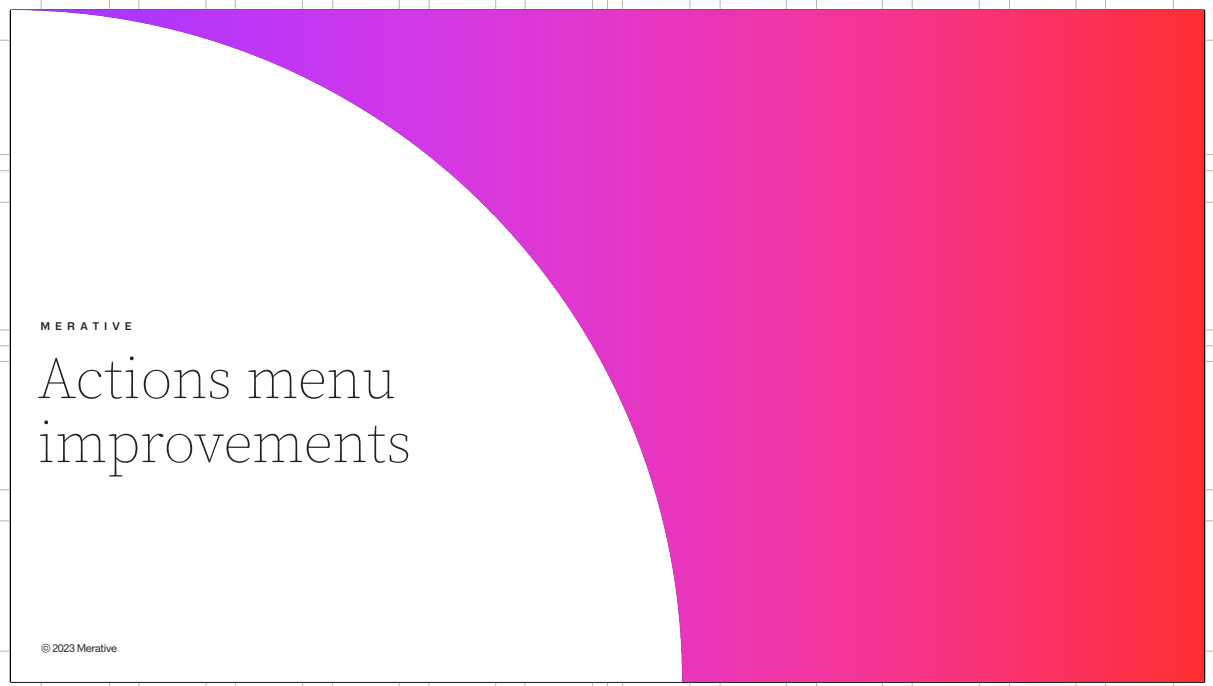
The Actions Menu improvement, allows an agency to surface the menu action items they consider important reducing the cognitive load on the caseworkers and improving the click count per task. This flexible feature can be configured application wide and if required can also be customized at a per menu level.

Autorecovery ensures that any data a user enters won't be lost in the event of a system interruption.

Editable notes and contact logs, allows the text of notes or contact log narratives to be edited in place by the author meaning they can come back them to complete, correct or update at a later time.

The addition of the subject field for contact logs meaning caseworkers can provide a meaningful overview for the contact. Contacts can also be retrieved later by searching for specific text within the subject and also the

narrative.



Actions menu improvements

## Business problem

### Business problem

Emma is a caseworker with an agency that operates on a task-driven basis. Emma performs a wide variety of actions as part of these tasks.

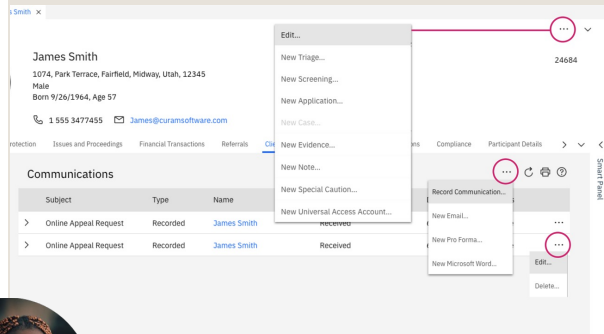
Actions Emma performs in SPM are typically hidden in a menu.

To access the actions Emma must click to open the actions menu, adding clicks to the process.



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### Current user experience



Emma is a caseworker with an agency that operates on a task-driven basis. Emma performs a wide variety of actions as part of these tasks.

Prior to 8.0.3 the actions Emma performs in SPM were typically hidden in a menu. Emma must click to open the menu before she can access the action, adding clicks to the process.

## Application-wide actions menu improvement

### Solution

Menu actions (important/commonly used items) can be surfaced out of the menu and available to caseworkers inline on the page

- Remainder of actions, less frequently used, are available in the overflow menu so UI doesn't become too noisy
- Adding to our Low Code / No Code approach
  - The default behavior of number of actions surfaced is configurable (no code)
  - The actions surfaced can be changed with customization in UIM (low code)

The screenshot displays a user interface for a case management system. At the top, a header area is labeled 'New user experience'. Below this is a user profile for Sue Brennan, including her contact information and a circular profile picture. The main content area is titled 'Communications' and contains a table with columns for Subject, Type, Name, Communication Status, Date, and Status. The table lists two 'Online Appeal Request' entries. Red dashed arrows highlight specific actions: 'Tab actions surfaced' points to 'New Application...' in the top navigation; 'Page actions surfaced' points to 'Record Communication...' in the table's toolbar; and 'List actions surfaced' points to 'Edit...' and 'Delete...' buttons in the table's row actions.

In 8.0.3 Improvements have been made to the way action menu items are displayed and selected for all tab, page, and row level actions menus throughout the application.

Users can now be provided with access to important or commonly used actions inline on the tab, page, or row level, rather than being required to navigate to and select an action from within an action menu item list.

Based on analysis of key business workflows, an agency can then further configure the action menu items to be displayed.

This includes the ability to configure the number of actions to display at a tab, page, and row level on an application-wide basis using a no code process or on an individual action menu basis using a low code method so that the most important actions are displayed.

## Change of circumstance

Our citizen Maria has recently become divorced, and she calls the government agency she receives benefits from, to update her information.

Emma the caseworker, will change Maria's relationship, surname and address.

Although the enhancement is aimed at caseworkers, it makes actions more easily available for all users, caseworkers, supervisors, administrators and so on.



**Emma Harris**  
Delivery of Benefits, Caseworker

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Let's now look at a real-world example. For Emma every **click counts** in tasks that are frequently repeated.

Today Emma is supporting our citizen Maria by processing a change of circumstance. Maria has recently divorced, and she calls the government agency she receives benefits from, to update her information.

To complete this task Emma will need to make multiple evidence changes – changing the relationship status, as well as Maria's surname and address

**As well as benefiting caseworkers such as Emma, it also makes actions more easily available for other users**



as well, such as supervisors and administrators.

## Change of circumstance

Menu action items are surfaced

The screenshot shows the Merative Social Program Management interface. The top navigation bar includes 'Home', 'Cases and Outcomes', 'Inbox', and 'Calendar'. The user is logged in as 'CASE WORKER'. The main content area displays the profile for 'Maria Hernandez' with details: '123, Apple Lane, Apple Street, Salt lake city, 12345', 'Male', and 'Born 2/23/1993, Age 30'. Below the profile is a table of evidence items. The 'Edit' action is highlighted in red in the table.

Type	Description	Source	Period	Latest Activity	Action
Addresses	Private address is 123, Apple Lane, Apple Street, Salt lake city, 12345	Person Record	2/24/2023 -	CASE WORKER on 2/24/2023 16:58	Edit
Birth and Death Details	Born 2/23/1993	Person Record	2/24/2023 -	CASE WORKER on 2/24/2023 16:58	Edit
Gender Details	Male	Person Record	2/24/2023 -	CASE WORKER on 2/24/2023 16:58	Edit
Identifications	Reference Number 30000001	Person Record	2/24/2023 -	CASE WORKER on 2/24/2023 16:58	Edit
Names	Maria Hernandez is the Registered name for this client.	Person Record	2/24/2023 -	CASE WORKER on 2/24/2023 16:58	Edit
Relationships	Spouse of Maria Hernandez is Juan Hernandez	Person Record	5/12/2015 -	CASE WORKER on 2/24/2023 17:04	Edit

When Emma navigates to Maria's case and opens the Evidence page the “Edit” menu actions are now surfaced.

Emma then selects the Edit action to update Maria's Relationship evidence and does the same to update Maria's name, and end date her Address evidence.

The new menu behavior saves Emma 3 clicks during this task.

## Change of circumstance

Menu action items are surfaced

The screenshot shows the Merative Social Program Management interface. A modal titled "New Evidence" is open, allowing the user to select an evidence type for creation. The modal contains a table with the following columns: "Type" and "Description". Each row in the table has an "Add..." button surfaced inline to the right of the description. The evidence types listed are: Addresses, Bank Accounts, Contact Preferences, Email Addresses, Gender Details, Identifications, Names, Phone Numbers, and Relationships. A red arrow points to the "Add..." button for the "Addresses" row, with the text "The add action is surfaced inline" written below it. The background shows the user profile for Maria Hernandez and a list of recent activity.

Type	Description	Action
Addresses	Record addresses for the client such as their private and mailing address.	Add...
Bank Accounts	Record details of any bank accounts held by the client.	Add...
Contact Preferences	Records the preferred contact type when corresponding and language.	Add...
Email Addresses	Record email addresses that can be used when communicating with the client.	Add...
Gender Details	Record the gender of the client.	Add...
Identifications	Record different types of identification for the client such as passport.	Add...
Names	Record any names the client uses such as registered name or alternative names.	Add...
Phone Numbers	Record phone numbers such as personal and mobile numbers.	Add...
Relationships	Participant Relationships.	Add...

After end dating the Address evidence Emma then opens the New Evidence modal and here she can see the "Add" actions are available directly on the list (rather than behind an overflow menu icon where previously located).

Every time Emma needs to add or edit a piece of evidence, these tasks will take fewer clicks than before.

## Benefits of the menu enhancement feature

Surfacing actions menu items across the application;

- Reducing click count
- Improving the user experience

The screenshot displays the 'Income Support 259 - test person' case page. The interface includes a sidebar with navigation options like 'Home', 'Cases and Outcomes', 'Income', and 'Calendar'. The main content area is titled 'In Edit Evidence' and contains a table of evidence items. Three red dashed boxes highlight specific menu actions:

- Tab menu actions surfaced inline:** A box highlights the 'Edit...' button in the top right corner of the evidence table.
- Page menu actions surfaced inline:** A box highlights the 'New Evidence' and 'Open In New Tab' buttons in the top right corner of the page.
- List menu actions surfaced inline:** A box highlights the 'Continue Editing' and 'Discard' buttons in the bottom right corner of the table.

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For Emma the benefit is not limited to evidence updates. Surfacing important menu actions across the application can deliver benefit to all business process flows, reducing the number of clicks that Emma has to perform and so improving her user experience.

## Actions menu improvements [Technical considerations](#)

### Before enabling the feature

Recommendations	Steps
Analyse JavaScript customisations that are configured for page or list action menu items, to assess if there are any potential impacts.	This can be done by analysing the SCRIPT element that is a child element of the associated ACTION_CONTROL element on custom UIMS/VIMS and then inspecting the JavaScript referenced by this element in order to determine if there are any potential impacts.
Analyse CSS customisations that are configured for page or list action menu items, to assess if there are any potential impacts.	This can be done by analysing the STYLE attribute on the associated ACTION_CONTROL element and then inspecting the CSS referenced by this attribute in order to determine if there are any potential impacts.
Analyse tests scripts that execute end to end tests on action menus within the application to determine if there could potentially be impacts on the tests.	If it is determined that there will be impacts to end to end tests, there is a data-testid attribute available on inline action menu items which can be referenced in the tests to fix them.

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Before enabling the menu improvement feature in the application, it is recommended to:

- Analyse JavaScript customisations that are configured for page or list action menu items.
- Analyse CSS customisations that are configured for page or list action menu items, to assess if there are any potential impacts.
- Analyse tests scripts that execute end to end tests on action menus within the application to determine if there could potentially be impacts on the tests.

The information included in the Steps column alongside each recommendation explains how to perform these activities.

## Actions menu improvements Configuration

### Application properties to enable this feature

Name	Description
Display <b>list</b> action menu items inline	Enables list actions to be displayed inline on the list row and immediately available to users. (Set to false by default)  When set to true, the first list action is displayed inline by default. Actions that are not displayed inline overflow into the list action menu.
Display <b>page</b> action menu items inline	Enables page actions to be displayed inline on the page and immediately available to users. (Set to false by default)  When set to true, the first two page actions are displayed inline by default. Actions that are not displayed inline overflow into the page action menu.
Display <b>tab</b> action menu items inline	Enables tab actions to be displayed inline on the tab action menu and immediately available to users. (Set to false by default)  When set to true, the first two tab actions are displayed inline by default. Actions that are not displayed inline overflow into the tab action menu.

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For SPM V8.0.3 the action menu improvement is disabled by default. To avail of the menu improvements, an agency can enable the feature using the following 3 global application properties. These 3 properties allow an Agency to turn on the improvement at List, Page and Tab level as required.

"Display list action menu items inline": Enables list actions to be displayed inline on the list row and immediately available to users. By default, the value is false.

- When set to true, the first list action is displayed inline by default. Actions that are not displayed inline overflow into the list action menu.

"Display page action menu items inline:" Enables page actions to be displayed inline on the page and immediately available to users.

- By default, the value is false.
- When set to true, the first two page actions are displayed inline by default. Actions that are not displayed inline overflow into the page action menu.

**Finally,** "Display tab action menu items inline:" Enables tab actions to be

displayed inline on the tab action menu and immediately available to users.

- By default, the value is false.
- When set to true, the first two tab actions are displayed inline by default. Actions that are not displayed inline overflow into the tab action menu.

## Actions menu improvements Configuration

### Application properties to change the number of actions that are displayed

Name	Description
Number of <b>list</b> actions to display inline	<p>Specifies the maximum number of action menu items to display inline on the list row. Actions that are not displayed inline overflow into the list action menu.</p> <ul style="list-style-type: none"><li>Recommended, 1-2 actions are displayed inline, with a maximum of 4.</li></ul>
Number of <b>page</b> actions to display inline	<p>Specifies the maximum number of action menu items to display inline on the page. Actions that are not displayed inline overflow into the page action menu.</p> <ul style="list-style-type: none"><li>Recommended, 2-3 actions are displayed inline, with a maximum of 4.</li></ul>
Number of <b>tab</b> actions to display inline	<p>Specifies the maximum number of action menu items to display inline on a tab. Actions that are not displayed inline overflow into the tab action menu.</p> <ul style="list-style-type: none"><li>Recommended, 2-3 actions are displayed inline, with a maximum of 4.</li></ul>

*\* If a value of 0 is set no menu action item will be surfaced*

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If an agency wants to change the number of actions that are displayed at the tab, page, and row level on an application-wide basis the default behavior can be changed using the following 3 global application properties.

- For each of these application parameters the recommended maximum is 4.
- And if a value of 0 is set no action menu item will be surfaced.

#### 1. Number of list actions to display inline:

- This parameter specifies the maximum number of action menu items to display inline on the list row. Actions that are not displayed inline overflow into the list action menu.
- Recommended, 1-2 actions are displayed inline, with a maximum of 4.

#### 2. Number of page actions to display inline:

- Specifies the maximum number of action menu items to display inline on the page. Actions that are not displayed inline overflow into the page action menu.
- Recommended, 2-3 actions are displayed inline, with a maximum of 4.



3. Number of tab actions to display inline:

- Specifies the maximum number of action menu items to display inline on a tab. Actions that are not displayed inline overflow into the tab action menu.
- Recommended, 2-3 actions are displayed inline, with a maximum of 4.

## Actions menu improvements [Customization](#)

### New attributes are available to customize individual menus

Name	Description
<code>&lt;ACTION_SET TYPE="LIST_ROW_MENU" MAX_INLINE_ITEMS="2"&gt;</code>	List level customization
<code>&lt;ACTION_SET MAX_INLINE_ITEMS="4"&gt;</code>	Page level customization
<code>&lt;mc:menu-bar xmlns:mc="&lt;name space&gt;" id="&lt;menu name&gt;" max-inline-items="3"&gt;</code>	Tab level customization

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If the Agency identifies a particular page where the global values are not appropriate they can customize individual pages or tabs using the new attributes that are provided to support customization.

For list and page level menu actions the new attribute "MAX\_INLINE\_ITEMS" on an action set element in the UIM for the page will allow the user to specify the number of action menu items to surface on a particular page.

The new Tab level attribute for the menu bar element supports tab action menu configuration.

The code snippets shown here will customize a specific page to surface 2 list level menu items, 4 page level menu items and 3 tab level items.

If after analyzing a particular page the Agency decides not to surface any menu items, a value of 0 can be used and no action menu item will be surfaced.

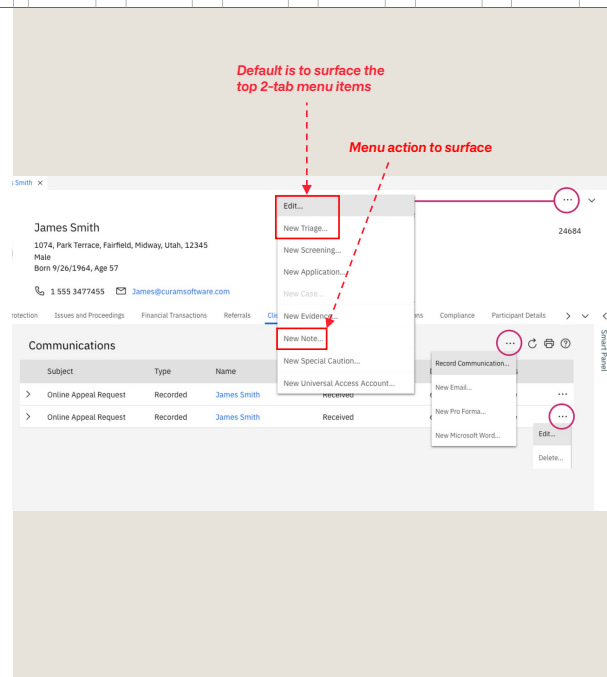
For more details on how to do this customization please see the: [Product](#)

documentation : <https://curam-spm-devops.github.io/wh-support-docs/spm/pdf-documentation>

## Action menu item order is important

The actions will be surfaced based on position in the menu listing.

If the requirement is to surface a menu action that is currently low down in the menu listing, Reorder the menu items so that the action to be surfaced is within the rule applied to that (for example in the top 2 positions on a tab menu will be surfaced by default)



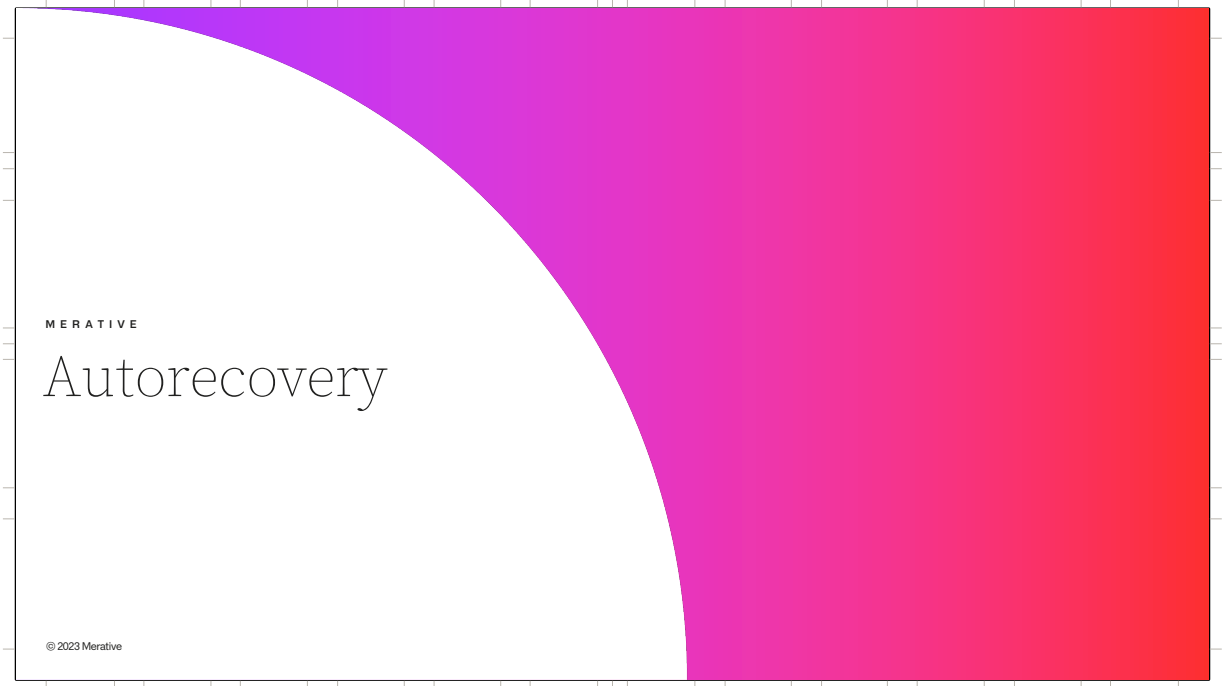
It should be noted that the menu actions will be surfaced based on their location in the menu listing.

For example, in this screenshot the tab level menu actions “Edit” and “New Triage” will be surfaced by default

If the Agency requirement is to surface a menu action that is currently low down in the menu listing, for example “New Note”, this can be done by re-positioning “New Note” to be in the top 2 positions on the tab menu and it will be surfaced by default.

This same mechanism can be applied to both List and Page menus actions.

The process to reorder the menu items is detailed in the Product documentation.



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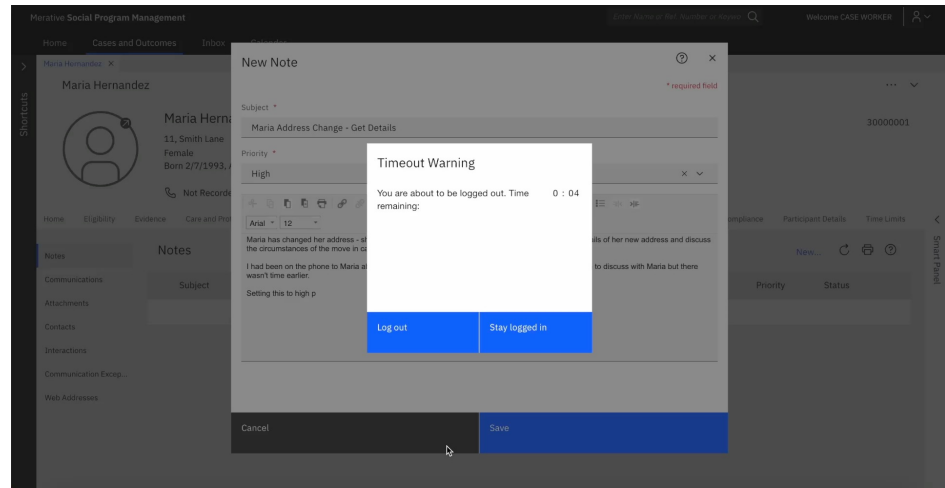
# Autorecovery

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## Autorecovery

SPM v8.0.3 provides support for the autorecovery of data in the event of a system interruption such as a session timeout. When caseworkers log back into the application after an interruption, they are immediately returned to the screen they were on previously and any data they had entered is restored.

Once you log back in after a timeout you are returned to the screen you were on prior to the interruption and all data is restored so you can continue where you left off.



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Before 8.0.3, if a system interruption such as a timeout occurred while entering data within a modal, the user was logged out after a warning, and once they logged back in, they were either returned to the dashboard or background page they had been working on (depending on the agency's tab session configuration) so any data entered was lost. Caseworkers are often called away when they are working on something, so this is a frequent scenario for them. It is especially frustrating if they had been entering a lot of text or data at the time of the interruption – for e.g. a note or contact log narrative.

Autorecovery is a new feature introduced in 8.0.3.0 which is triggered when there is a system interruption such as a session timeout, browser crash, or if the user is kicked out without any warning. Now when caseworkers log back into the application after an interruption, they are returned to the screen they were previously on and any data entered is restored.

*Play Video* – In the video, you see Emma has been creating a note when she was called away from her computer, she times out of the application and has to log in again. Once she logs in she is returned to the New note modal

which she had open prior to the timeout. As you can see all the data she had entered previously is restored so nothing is lost and she can continue exactly where she left off.

## Autorecovery **Technical considerations**

Autorecovery is **supported** for:

- UIM pages where data is entered (modals and wizards)
- The most frequently used form elements within UIM pages

**Scenarios** Autorecovery is mainly triggered by a session timeout when a modal is open, but also other use cases such as the browser tab being refreshed or the browser tab being closed and reopened.

- There are some scenarios where autorecovery is not triggered, for example where connectivity is lost and a timeout subsequently happens.

**Autorecovered data** is kept in the autorecovery record until the user logs back in.

There should be no effect to **upgrades** but it is encouraged for caseworkers to save any outstanding work before an upgrade occurs to ensure any unsaved data is not lost. For major upgrades, there is the potential that the Autorecovery table might need to be cleared down removing autorecovery data for individual users.

*\*For more information refer to the Autorecovery documentation within the Web Client Reference Guide*

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**Currently, in SPM v8.0.3.0 Autorecovery is supported for UIM pages where data is entered.** This is all standard, dynamic, and generated user interface metadata (UIM) modals including wizards across the application.

The most frequently used form elements such as text input fields, address widgets, checkboxes, rich text editors, text areas, date pickers, numbers and dropdowns populated from codetables are all supported by Autorecovery. There are some less frequently used elements which are not supported currently.

For more detail on what's supported and what's not, please refer to the documentation.

**Autorecovery is mainly triggered by a session timeout when a modal is open,** but there are also other use cases such as the browser tab being refreshed or browser tab or browser window being closed and reopened. While a session is still active the recovery is managed within the session state, this means the user can close the browser tab and re-open it and get back to where they were. However If the user times-out, the recovery is managed by storing



the data to the database when the timeout occurs, and restoring the data on login.

If a session is terminated in an "unorderly way" the ability to manage the recovery is lost. This includes situations where connectivity is lost or where the server crashes and a timeout subsequently happens.

**Autorecovered data is kept in the autorecovery record until the user logs back in.** Customer organizations, based on their view of the governance of the data, must consider whether they want to customize locally to remove the data at some point, for example by creating a custom batch process if needed.

It is encouraged for caseworkers to save any outstanding work before an **upgrade** occurs to ensure any unsaved data is not lost. For major upgrades, there is the potential that the Autorecovery table might need to be cleared down removing autorecovery data for individual users.

## Autorecovery [Property configurations](#)

Sysadmin properties	Description
<b>Enable Autorecovery</b> (curam.sessionmanagement.tabsession.autorecovery.enabled)	Property to enable autorecovery in all application areas where autorecovery is supported (set to false by default)
<b>Enable CuramFormsAPI</b> (curam.sessionmanagement.tabsession.curamformsapi.enabled)	The CuramFormsAPI exposes a programmable interface for forms in modals. The API is used to listen for changes in the form fields, get the field value and set the field value. This feature is currently only supported for use with the Autorecovery feature.
<b>Autorecovery throttle interval</b> (curam.sessionmanagement.tabsession.autorecovery.throttleinterval)	The length of time in milliseconds to be applied between autorecovery post requests to the server (set to 500 by default)

Application Configuration properties	Description
<b>Existing Tab Session Management configurations</b> (tabSessionUpdateCountThreshold and tabSessionUpdatePeriodThreshold)	Setting the tab session properties enhances the autorecovery experience by ensuring the data is persisted to the database at a frequent interval and that the background page matches the modal that is recovered.

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There are a number of **settings** which are required for autorecovery to work, and others which while not specifically needed for autorecovery will enhance the experience.

Firstly, we have the sys admin properties. For SPMV8.0.3 Autorecovery is not enabled by default. So to avail of Autorecovery, it must be enabled within the System Administration application.

A new API is also provided which is used to listen for changes in form fields (within any standard modals), and

if there is a change, it gets and sets the value within the autorecovery record. By default this API is not enabled. To use autorecovery this API should also be enabled with the System Administration application.

The introduction of the Autorecovery throttle interval property which limits the number of requests that can be sent by the user is limited by time, referred to as throttling. Therefore, it is advisable to leave the property set to the default value of 500 milliseconds. Each autorecovery save request sends all fields in the form, so only the last generated request is sent when the throttle time has elapsed. Throttling is most relevant when using the Rich Text Field where a user's progress is saved as the user is typing instead of waiting for the user to exit the field.

Secondly, we have the Application Configuration properties which are set as part of your deployment configuration and not through system administration

It is advisable to set the `tabSessionUpdateCountThreshold` and `tabSessionUpdatePeriodThreshold`.

The `tabSessionUpdateCountThreshold` setting specifies the number of tab session data updates that must be received before the data is persisted from the web tier to the database. Once the threshold is reached, the recent updates are written to the database.

The `tabSessionUpdatePeriodThreshold` setting specifies the number of seconds that must have elapsed since the last time session data was persisted from the web tier to the database before a new update will trigger another write.

While autorecovery is not dependant on these values to work, setting them to low values for your system will enhance the user's experience. See the session management section within the *Web Client Reference guide* for

further information on setting this property.



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# Contact log subject & Enhanced search

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## Contact log subject

Caseworkers can now enter a subject for a contact log narrative allowing them to give a little more insight to what the contact is about.

Subject field added to a contact log so you can provide an overview about the contact

Merative Social Program Management

Home Cases and Plans Maria Hernandez X Child Services 257

Home Allegations Contact Log Notes Communications Attachments Meeting Minutes

New Contact

Details Subject and Narrative Participants Attachments

Step 2: Contact Subject and Narrative

Subject \*required field

Narrative

Cancel Save & Exit Back Next

In SPM V8.0.3 caseworkers can now enter a subject for a contact log narrative in addition to the other fields. This will provide overview information for the contact giving a little more insight into what the contact is about.

## Contact log subject

Subject is displayed on all contact log pages.

Subject field visible in the list so its easier to find a specific contact by scanning the subjects

The screenshot shows the 'Contact Logs' page in the Merative Social Program Management system. A table lists various contact events with columns for Subject, Type, Purpose, Location, Method, Source, Start, and End. The 'Subject' column is highlighted in red, and a red dashed line points to it from the text on the left.

Subject	Type	Purpose	Location	Method	Source	Start	End
Maria - parent teacher meeting incident	Notification	Other	Other	Phone	Ongoing	1/30/2023 09:00	1/30/2023 09:30
Maria - Altercation at school	Notification	Other	Other	Phone	Ongoing	1/30/2023 09:00	1/30/2023 09:30
Domestic Abuse Contact for Investigation	Interview	Alleged Victim Contact	Office	Face to Face	Ongoing	1/30/2023 01:30	1/30/2023 02:00
	Home Visit	Initial Contact with Alleged Victim	Office	Hardcopy	Ongoing	1/30/2023 01:30	1/30/2023 03:00
Alcohol consumption discussion	Interview	Assessment Discussion Entry, Case Planning Entry	Home	Face to Face	Ongoing	1/24/2023 00:00	1/24/2023 00:30
Hospital visit after Maria feel down stairs (alcohol)	Interview	Assessment Discussion Entry	Hospital	Face to Face	Ongoing	1/11/2023 01:30	1/11/2023 02:00
MDT Meeting regarding Maria	Multi-Disciplinary Team Conference	MDT Conference Entry	Office	Face to Face	Ongoing	1/9/2023 09:00	1/9/2023 11:00
Incident at home	Home Visit	Alleged Victim Contact, Assessment Discussion Entry	Office	Face to Face	Ongoing	12/12/2022 00:00	12/12/2022 01:00

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The subject is displayed on all the contact log pages including the contact log list meaning caseworkers can scan the list of contacts to find a particular one more easily than before

As the subject is optional, there may be contacts which don't have a subject but it can be easily added through modifying the record if needed.

## Enhanced contact log search

Caseworkers can search both the subject and the narrative for specific text.

Can search by subject and narrative in addition to the other fields

Search results show exactly where the search terms were found

Subject and Narrative	Type	Purpose	Location	Method	Date
Maria - <b>Abuse</b> at school Further details about <b>abuse</b> - <b>teacher</b> has made	Notification	Other	Other	Phone	30/01/2023 09:00:00 - 30/01/2023 09:30:00
Maria - parent <b>teacher</b> meeting incident Maria phoned to discuss an <b>abuse</b> which took place	Notification	Other	Other	Phone	30/01/2023 09:00:00 - 30/01/2023 09:30:00

If subject is configured, Caseworkers can now search both the subject and the narrative for specific text. The search returns a list of contacts that contain any of the words entered. The search will also find matches that contains similar words. For e.g if counsellor is entered, records which contain the word 'counsellor' or 'counselling' are returned. For best matches, it is advised to enter more characters.

Within the search results, the caseworker can easily see where the words were found – whether it was in



the subject or the narrative or if it was in both.  
Each search displays the results in ranked order  
based on best match.

## Enhanced contact log search

Caseworkers can search both the subject and the narrative for specific text.

Expanding the row shows the search terms within the narrative text

Subject and Narrative	Type	Purpose	Location	Method	Date
<input type="checkbox"/> Maria - <b>abuse</b> at school Further details about <b>abuse</b> - <b>teacher</b> has made	Notification	Other	Other	Phone	30/01/2023 09:00:00 - 30/01/2023 09:30:00
<b>Narrative</b> Details Participants Attachments Case Worker On: 3/30/2023 15:46 Further details about <b>abuse</b> - <b>teacher</b> has made a complaint and Maria is not allowed near the school while investigation is in place Case Worker On: 1/30/2023 15:11 → Maria phoned to discuss an <b>abuse</b> which took place at the school yesterday between her child's <b>teacher</b> and herself We briefly discussed - further details to be added I can continue adding the details later when I have more time					
<input type="checkbox"/> Maria - parent <b>teacher</b> meeting incident Maria phoned to discuss an <b>abuse</b> which took place	Notification	Other	Other	Phone	30/01/2023 09:00:00 - 30/01/2023 09:30:00
<b>Narrative</b> Details Participants Attachments Case Worker On: 3/30/2023 15:41 Maria phoned to discuss an <b>abuse</b> which took place at the school yesterday between her child's <b>teacher</b> and herself We briefly discussed - further details to be added					

When caseworkers expand a row within the search results, they can also see exactly where in the narrative the search word was found.

This enhanced searching capability means it is much easier to locate a contact quickly especially when there could be 100s of contacts recorded against a case. Caseworkers no longer need to scroll down long lists and open each contact individually to find what they are looking for.



## Enhanced contact log search

Can filter by other search criteria to narrow the search results

The screenshot displays the 'Search Contacts' interface within the Merative Social Program Management system. The interface includes a navigation menu on the left with options like 'Home', 'Cases and Plans', 'Inbox', and 'Calendar'. The main content area is titled 'Hernandez Ongoing 267' and contains a 'Search Contacts' section. This section features a 'Search Criteria' form with several dropdown menus: 'Subject and Narrative' (set to 'teacher altercation'), 'Concerning Participant', 'Type', 'Purpose', 'Start Date', 'End Date', 'Contact Participant', 'Method' (set to 'Face to Face'), and 'Location'. Below the form is a 'Search Results' table with one item listed.

Subject and Narrative	Type	Purpose	Location	Method	Date
María - Altercation at school Further details about altercation - teacher has made	Notification	Other	Other	Face to Face	30/01/2023 09:00:00 - 30/01/2023 09:30:00

Caseworkers can still filter by the other search criteria such as the start and end date or the concerning participant, to further narrow the search

## Contact log subject/enhanced search [Technical considerations](#)

### Contact log subject

- A new 'subject' field has been added to the Contact Log entity

### Contact log subject settings

Sysadmin properties	Description
<b>Enable Contact Log Subject</b> (curam.contactlog.subject.enabled)	Indicates if the subject field is enabled for contact logs.

### Enhanced search for contact logs

- The enhanced search allows caseworkers to search for contacts by narrative in addition to the other fields.
- Searching by Narrative is automatically available in SPM 8.0.3 but can be turned off if required.
- If subject is enabled for contact logs then the enhanced search also searches for contacts by subject.
- The enhanced contact log search has been developed using Lucene (v 8.11) specifically the Lucene Memory Index feature which leverages natural language processing (NLP), returns best-matched fragments for the text provided and provides language analysers for several languages. For more information see [here](#)

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A new 'subject' field has been added to the contact log entity.

By default for SPMV8.0.3 the subject field is not enabled on any screens. In order to avail of the subject field for a contact, it must be enabled within System Administration. Once enabled, the subject field is displayed on all contact pages.

The enhanced search for contact logs allows caseworkers to search the narrative for specific text or keywords. This capability to search by narrative is automatically enabled for 8.0.3, it does not have to be configured. However it can be turned off if required by an agency through a hidden property.

If the subject has been enabled for contact logs then the enhanced search also allows caseworkers to search the subject in addition to the narrative for specific text.

The enhanced contact log search has been developed using Lucene (v 8.11). Lucene is an open source third party library for searches. We have specifically leveraged the Lucene Memory Index feature which uses natural

language processing (NLP). The Lucene API we call returns the best-matched fragment(s) for the keywords or text provided, with the keywords highlighted in yellow. Lucene supports porter-stemming, so similar words will be searched for too. Lucene also provides language analysers for a great number of languages. We've taken advantage of that and the appropriate analyser is used for each of our nine group-one languages. The analyser invoked is based on the user's locale.

There is a link to more information about this feature if needed.



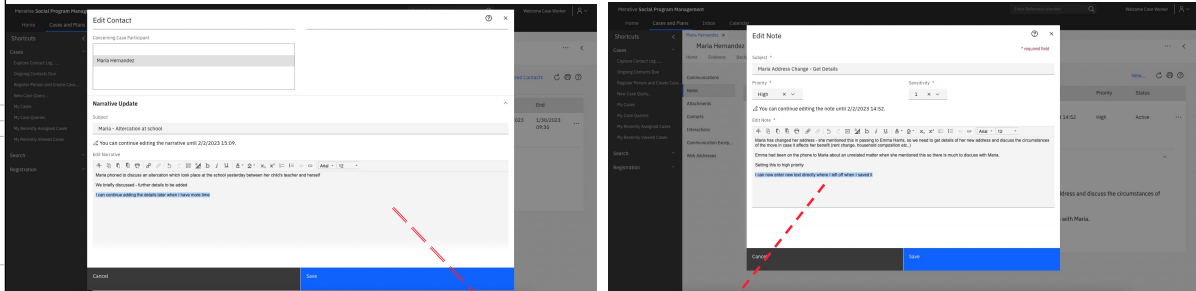
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# Editable notes & Contact logs

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## Editable notes and contact logs

In SPM V8.0.3, caseworkers will be able to update the text of any notes or contact log narratives they have created or appended to, for a specific editable period that is set by an administrator.



Can make unlimited edits to the text of notes and contact log narratives for a period.

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Before 8.0.3, caseworkers were unable to edit their contact log narrative or note text in place. Once they started to enter a contact log for e.g., they had to complete it in one go and make sure it had all the necessary details and contained no mistakes. Caseworkers typically don't have the time to do this in one sitting, they like to be able to come back later and complete their work, when they have more time but they still need to capture some initial details so they don't forget about the interaction they're describing.

In SPM V8.0.3, caseworkers will now be able to update the text of any notes or contact log narratives they have created or appended to, for a specific editable period that is set by an administrator. By default this period is 72 hours.

Taking contact logs as an example, this means for 72 hours after a contact log is created, the caseworker who created the contact log can make unlimited edits to the text and can come back to the contact log when they have more time to spend writing up and correcting the detail.



## Editable contact logs

Pen icons & tooltip text help caseworkers understand they can edit the contact log narrative.

Subject	Type	Purpose	Location	Method	Source	Start	End
Maria - Altercation at school	Notification	Other	Other	Phone	Ongoing	1/30/2023 09:00	1/30/2023 09:30

You can continue editing the narrative.

You can continue adding the narrative until 2/2/2023 15:00

Caseworker: On: 1/30/2023 15:09  
Maria phoned to discuss an altercation which took place at the school yesterday between her child's teacher and herself

We briefly discussed - further details to be added

Expanding the contact shows the date and time after which they can no longer edit.

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During the editable period, pen icons are displayed to help the author and other caseworkers to understand whether they can edit or append to a contact log narrative. The pen icon displayed to authors indicates that they can continue to edit their narrative. Only those who created or appended to the narrative can edit it. By expanding the contact, the author can also see the end date and time after which they can no longer edit the narrative.

It works the same way for notes. For 72 hours after a note is created, the caseworker who created the note can make unlimited edits to the text and can come back to the note when they have more time to spend writing up the detail.

## Editable contact logs

The screenshot displays the Merative Social Program Management interface. The main window shows a 'Contact Logs' table with columns for Subject, Type, Purpose, Location, Method, Source, Start, and End. A red dashed arrow points from a red text annotation to a pen icon in the 'Type' column of a row. A tooltip for this icon reads: 'Someone is currently editing the narrative. You can edit other information!'. Below the main window, an 'Edit Contact' modal is open, showing a 'Narrative Update' section with a text area and a 'Save' button. A red dashed arrow points from a red text annotation to the 'Save' button.

*If the caseworker is not able to edit the narrative the icon and tooltip helps them understand why.*

*While the caseworker can still change the other details of a contact log the narrative is disabled if someone else is currently editing it.*

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For other caseworkers, who can't make any changes during the editable period, the pen icon displayed indicates that someone else is editing the narrative and they cannot append to it at this time. By expanding the contact, the non-author can see the date and time from when they can append to the narrative.

Non-authors of contact logs can still change any of the other details within a contact log during the editable period, such as the purpose or the date, they just can't change the current narrative – this field is disabled.

## Editable notes

*If the caseworker is not able to edit the note, the icon and tooltip helps them understand why.*

Notes	Subject	Last Update	Entered By	Date	Priority	Status
✖	Mark Address Change - Get Details	✖	Case Worker	1/30/2023 14:59	High	Active

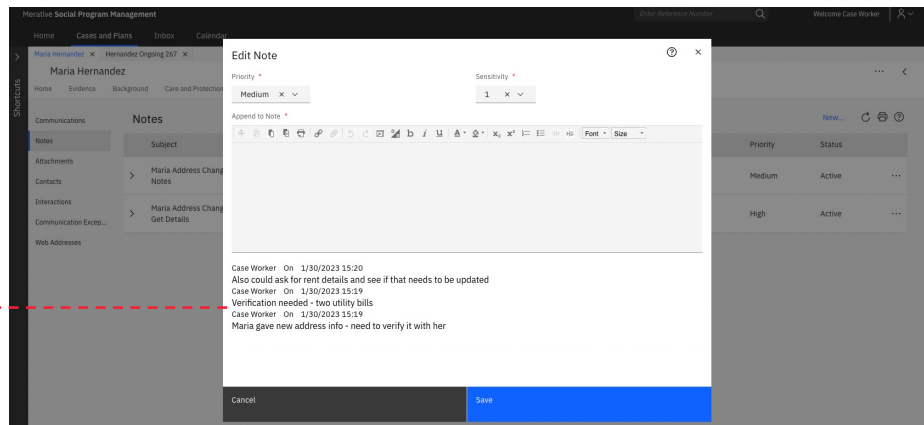
*If another person is editing a note, then the caseworker is unable to make any changes to the note until the end of the editable period.*

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It is a similar experience for notes, with the exception that the non-author can't edit any other details of a note during the editable period.

## Editable notes

Also in SPM v8.0.3, when editing a note or contact log, caseworkers can view the history of previous addendums to the note or narrative within the edit modal itself.



*The history of previous addendums for the note or contact log are displayed within the edit modal itself.*

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Along with making notes and contact log narratives editable, in SPM v8.0.3, when editing a note or contact log, caseworkers can also view the history of previous addendums to the note or narrative within the edit modal itself. This allows them to recap on what was previously entered which will help them complete their update by reminding them of what was previously there.

## Editable notes and contact logs [Technical considerations](#)

### Editable notes and contact logs

- A new field 'latestNoteCreationDateTime' has been added to the Note entity.

### Editable notes and contact logs settings

Sysadmin properties	Description
<b>Enable Editable Contact Narrative in Contact Logs</b> (curam.contactlog.narrative.edit.enabled)	Indicates if the contact log narrative can be updated for a pre-configured period.
<b>Enable Editable Note Text</b> (curam.miscapp.editnoteenabled)	Indicates if the text of a note can be updated for a pre-configured period.
<b>Contact Narrative Editable Period Length</b> (curam.contactlog.narrative.edit.period.length)	The number of hours during which users can edit contact log narratives they created or appended to.
<b>Notes Editable Period Length</b> (curam.miscapp.editnoteperiodlength)	The number of hours during which users can edit the text of notes they created or appended to.

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The changes made for editable notes and contact logs are modifications of existing screens and facades, no new screens or facades have been added. A new 'latestNoteCreationDateTime' field has been added to the Note entity. This field is populated when a note or contact log narrative is created or appended to and is used to determine when the editable period ends.

By default for SPMV8.0.3 editable notes and contact logs are not enabled. To avail of these features, they both must be enabled separately within System Administration. Once enabled, caseworkers can edit notes or contact log narratives that they created or appended to for a pre-configured time period.

There are also settings which define the length of time in hours for this pre-configured time period. There is a separate setting for each of notes and contact logs. By default both are set to 72 hours.

Thank you

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