

IBM Watson Health

IBM Social Program Management V8.0.0
Deep Dive: Evidence Broker Improvements



Agenda

- Evidence Broker Background
- Problem Background
- Solution Details
 - Business
 - Technical
- Where to Find More Information

Evidence Broker Background

- Evidence Broker is an SPM module that allows evidence to be shared across multiple cases without caseworker intervention.
- Initial enhancements to the evidence sharing features of the Evidence Broker began in SPM V7.0.2.
 - Advanced data-matching algorithms that match and link evidence records
 - Wider set of shared data for better matching and context when manual intervention is required
 - Creation of delivery plans for each piece of evidence shared
 - Two workflows to drive a structured sharing process
 - Tools for tracing the flow of evidence through the system
- These earlier enhancements have paved the way for the enhancements provided by V8.0.0.

Problem Background

When manually processing incoming evidence, caseworkers may already have the same type of evidence on their case.

Incoming evidence is not an exact match but is comparable. Caseworkers need to determine if the incoming evidence can be used to update the existing evidence.

Comparable evidence can be complex and time-consuming to process.

The screenshot displays the 'Income Support - 265' interface. At the top, there are navigation tabs: Home, Eligibility, Evidence, Eligibility Checks, Compliance, Participation, Time Limits, Appeals, Case Details, Events, and Administration. A sidebar on the left contains links for Dashboard, Action Evidence, In Edit Evidence, Verifications, Issues, Incoming Evidence, and Guest Change. The main content area is titled 'Incoming Evidence' and shows a case for 'Student' (Marta Hernandez) with the description 'Attends Wilson Vocational School Vocational Part Time' and an effective date of 6/1/2020. Below this, there is a section for 'Update Existing Evidence' with a warning icon and the text 'Resolve 1 conflict'. It asks the user to review where information is different and confirm which is correct, with radio buttons for 'Incoming information is correct' and 'Existing information is correct'. At the bottom, two side-by-side panels compare the 'Incoming Evidence' and 'Existing Evidence'. The incoming evidence is for 'Attends Wilson Vocational School Vocational Part Time' and the existing evidence is for 'Attends Wilson Vocational School Vocational Full Time'. Both have an effective date of 6/1/2020. The interface includes various controls like 'Add as New', 'Ignore', 'Update', and 'Delete Existing'.

Problem Scenario



David Nader

Caseworker, Income Support
Work Queue Based
HHS Government Agency

*"I'm excited to help people but
I'm overwhelmed by all of the
things I need to know and to
keep track of."*

Needs

Process citizen change of circumstances ensuring benefits are correctly reflected.

Process complex evidence changes being shared that require manual review and processing.

Easier way to analyze and determine how to process the incoming evidence.

- Conflicting evidence
- More recent or historical changes to the evidence

More streamlined process that requires fewer steps and actions.

Solution – Incoming Evidence UI Enhancement

SPM version 8.0.0 introduces enhancements that make it less complicated to process incoming evidence that is comparable to existing evidence.

David can now perform the following actions:

- Update the existing evidence with the incoming evidence in one step
- View labels, informational messages, and options relevant to the evidence being compared for guidance
- Compare the evidence on an enhanced timeline view
- Identify when more than one existing evidence is comparable to the incoming evidence
- Identify when and how to provide missing mandatory information



David Nader

Scenario

Our Caseworkers



Caseworker,
Income Support
Work Queue-Based

David Nader



Caseworker,
Income Support
Work Queue-Based

Sarah Levy

Processing evidence can be complex:

- Citizens can have multiple benefits and cases
- Cases can be managed by multiple caseworkers
- Incoming and existing evidence might conflict
- Incoming evidence may not conflict but might include more recent or even historical information
- Combination of these factors may exist
- Incoming and existing evidence may include parent-child relationships and changes over time

Scenario 1

- Maria reports she is enrolled in school as a full-time student.
- Maria's Food Assistance case is updated.
- Maria then applies for Cash Assistance.
- Maria's Student evidence is shared to the Cash Assistance case.



Citizen

Maria Hernandez

Citizen, Client
in receipt of
Income Support



Caseworkers

Sarah Levy

Caseworker,
Income Support
Work Queue-Based



David Nader

Caseworker,
Income Support
Work Queue-Based

Scenario 1

- Maria reports a correction to her student status of *Part-Time*.
- Maria's Food Assistance case is updated.
- The correction to the Student evidence is shared to the Cash Assistance case.



Citizen

Maria Hernandez

Citizen, Client
in receipt of
Income Support



Caseworkers

Sarah Levy

Caseworker,
Income Support
Work Queue-Based



David Nader

Caseworker,
Income Support
Work Queue-Based

Processing Incoming Evidence – Correction



Student incoming evidence on the case

Comparison View of Student evidence

Incoming evidence displayed beside the existing Student evidence

Income Support - 260

Open

- Items To Verify (1)
- Evidence In Edit (1)
- Undisposed Applications (0)
- Recommendations (0)

Referrals (0)

Maria Hernandez
Primary | 31 years

ELIGIBILITY WORKER

Home Overview Eligibility Evidence Eligibility Checks Compliance Participation Time Limits Appeals Case Details Events Administration

Dashboard

Incoming Evidence

In Edit Evidence

Verifications

Issues

Incoming Evidence

Guided Change

Incoming Evidence

Student Maria Hernandez Attends Winston Vocational College Vocational Part Time 6/1/2020 - ELIGIBILITY WORKER on 259

Update Existing Evidence

Review the timeline of changes before you update the existing evidence with information from Income Support case 259. If you don't want to update the existing evidence, choose 'Add as New' or 'Ignore'.

Resolve 1 conflict

Review where information is different and confirm which information is correct.

Incoming information is correct Existing information is correct

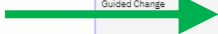
[Update](#)

Incoming Evidence	Existing Evidence
<p>From Income Support case 259</p> <p>Add as New Ignore</p> <p>Current Description Attends Winston Vocational College Vocational Part Time</p> <p>Timeline of changes</p> <p>Select a date to compare (Conflict) 6/1/2020</p> <p>Student started on 6/1/2020 Edit</p>	<p>On this case</p> <p>Current Description Attends Winston Vocational College Vocational Full Time</p> <p>Timeline of changes</p> <p>Select a date to compare (Conflict) 6/1/2020</p> <p>Student started on 6/1/2020 Delete Existing</p>

New Update Existing Evidence Card



A new *Update Existing Evidence* card displays information and options relevant to the incoming and existing evidence



Income Support - 260

Home Overview Eligibility Evidence Eligibility Checks Compliance Participation Time Limits Appeals Case Details Events Administration

Dashboard

Active Evidence

In Edit Evidence

Verifications

Issues

Incoming Evidence

Guided Change

Incoming Evidence

Update Existing Evidence
Review the timeline of changes before you update the existing evidence with information from Income Support case 259. If you don't want to update the existing evidence, choose 'Add as New' or 'Ignore'.

Resolve 1 conflict
Review where information is different and confirm which information is correct.

Incoming information is correct Existing information is correct

Incoming Evidence
From Income Support case 259

Current Description
Attends Winston Vocational College Vocational Part Time

Timeline of changes Select a date to compare (Conflict) 6/1/2020

Student started on 6/1/2020

Effective Date	
Household Member	Maria Hernandez (31)
School Name	Winston Vocational College
School Type	Vocational
Highest Grade Completed	High School Diploma
Current Grade	
Special Program	
Start Date	6/1/2020
Final Exam Date	
Student Status	<input type="radio"/> Part Time
Graduation Date	
Course Name	
End Date	

Existing Evidence
On this case

Current Description
Attends Winston Vocational College Vocational Full Time

Timeline of changes Select a date to compare (Conflict) 6/1/2020

Student started on 6/1/2020

Effective Date	
Household Member	Maria Hernandez (31)
School Name	Winston Vocational College
School Type	Vocational
Highest Grade Completed	High School Diploma
Current Grade	
Special Program	
Start Date	6/1/2020
Final Exam Date	
Student Status	<input type="radio"/> Full Time
Graduation Date	
Course Name	
End Date	

← Informational Message

← Resolve 1 conflict Label

← Radio Buttons

New Conflict Labels



In an enhanced timeline of changes view, a new *Conflict* label displays above the dates where conflicts exist

Income Support - 260

Home Overview Eligibility **Evidence** Eligibility Checks Compliance Participation Time Limits Appeals Case Details Events Administration

Dashboard

Active Evidence

In Edit Evidence

Verifications

Issues

Incoming Evidence

Guided Change

Incoming Evidence

Update Existing Evidence

Review the timeline of changes before you update the existing evidence with information from Income Support case 259. If you don't want to update the existing evidence, choose 'Add as New' or 'Ignore'.

Resolve 1 conflict

Review where information is different and confirm which information is correct.

Incoming information is correct Existing information is correct

[Update](#)

Incoming Evidence [Add as New](#) [Ignore](#)

From Income Support case 259

Current Description
Attends Winston Vocational College Vocational Part Time

Timeline of changes

Select a date to compare
(Conflict) 6/1/2020

Student started on 6/1/2020 [Edit](#)

Effective Date	
Household Member	Maria Hernandez (31)
School Name	Winston Vocational College
School Type	Vocational
Highest Grade Completed	High School Diploma
Current Grade	
Special Program	
Start Date	6/1/2020
Final Exam Date	
Student Status	Part Time
Graduation Date	
Course Name	
End Date	
Work Study	false

Existing Evidence

On this case

Current Description
Attends Winston Vocational College Vocational Full Time

Timeline of changes

Select a date to compare
(Conflict) 6/1/2020

Student started on 6/1/2020 [Delete Existing](#)

Effective Date	
Household Member	
School Name	Winston Vocational College
School Type	Vocational
Highest Grade Completed	High School Diploma
Current Grade	
Special Program	
Start Date	6/1/2020
Final Exam Date	
Student Status	Full Time
Graduation Date	
Course Name	
End Date	
Work Study	false

Conflict Highlighted

New Icon to Highlight Differences



A new icon and yellow highlighting to show where the information differs

Income Support - 260

Home Overview Eligibility **Evidence** Eligibility Checks Compliance Participation Time Limits Appeals Case Details Events Administration

Dashboard
Active Evidence
In Edit Evidence
Verifications
Issues
Incoming Evidence
Guided Change

Incoming Evidence

Update Existing Evidence
Review the timeline of changes before you update the existing evidence with information from Income Support case 259. If you don't want to update the existing evidence, choose 'Add as New' or 'Ignore'.

Resolve 1 conflict
Review where information is different and confirm which information is correct.
 Incoming information is correct Existing information is correct

[Update](#)

Incoming Evidence

From Income Support case 259 [Add as New](#) [Ignore](#)

Current Description
Attends Winston Vocational College Vocational Part Time

Timeline of changes
Select a date to compare (Conflict) 6/1/2020

Student started on 6/1/2020 [Edit](#)

Effective Date	
Household Member	Maria Hernandez (31)
School Name	Winston Vocational College
School Type	Vocational
Highest Grade Completed	High School Diploma
Current Grade	
Special Program	
Start Date	6/1/2020
Final Exam Date	
Student Status	Part Time
Graduation Date	
Course Name	
End Date	
Work Study	false

Existing Evidence

On this case

Current Description
Attends Winston Vocational College Vocational Full Time

Timeline of changes
Select a date to compare (Conflict) 6/1/2020

Student started on 6/1/2020 [Delete Existing](#)

Effective Date	
Household Member	Maria Hernandez (31)
School Name	Winston Vocational College
School Type	Vocational
Highest Grade Completed	High School Diploma
Current Grade	
Special Program	
Start Date	6/1/2020
Final Exam Date	
Student Status	Full Time
Graduation Date	
Course Name	
End Date	
Work Study	false

Conflict Highlighted

New Update Action



David confirms the part-time student status is correct

He selects the *Incoming information is correct* radio button and one Update action

Income Support - 260

Home Overview Eligibility **Evidences** Eligibility Checks Compliance Participation Time Limits Appeals Case Details Events Administration

Dashboard

Active Evidence

In Edit Evidence

Verifications

Issues

Incoming Evidence

Guided Change

Incoming Evidence

Update Existing Evidence

Review the timeline of changes before you update the existing evidence with information from Income Support case 259. If you don't want to update the existing evidence, choose 'Add as New' or 'Ignore'.

Resolve 1 conflict

Review where information is different and confirm which information is correct.

Incoming information is correct Existing information is correct

[Update](#)

[Add as New](#) [Ignore](#)

Incoming Evidence

From Income Support case 259

Current Description

Attends Winston Vocational College Vocational Part Time

Timeline of changes

Select a date to compare
(Conflict)
6/1/2020

Student started on 6/1/2020 [Edit](#)

Effective Date	
Household Member	Maria Hernandez (31)
School Name	Winston Vocational College
School Type	Vocational
Highest Grade Completed	High School Diploma
Current Grade	
Special Program	
Start Date	6/1/2020
Final Exam Date	
Student Status	<input type="radio"/> Part Time
Graduation Date	
Course Name	
End Date	
Work Study	false

Existing Evidence

On this case

Current Description

Attends Winston Vocational College Vocational Full Time

Timeline of changes

Select a date to compare
(Conflict)
6/1/2020

Student started on 6/1/2020 [Delete Existing](#)

Effective Date	
Household Member	Maria Hernandez (31)
School Name	Winston Vocational College
School Type	Vocational
Highest Grade Completed	High School Diploma
Current Grade	
Special Program	
Start Date	6/1/2020
Final Exam Date	
Student Status	<input type="radio"/> Full Time
Graduation Date	
Course Name	
End Date	
Work Study	false

New Contextual Confirmation Modals



A new contextual confirmation modal provides an informational message specific to the option selected explaining what will happen.

The screenshot shows the 'Income Support - 260' application interface. The main content area is titled 'Incoming Evidence' and contains a section for 'Update Existing Evidence'. This section includes a warning icon and the text 'Resolve 1 conflict', followed by instructions to review the timeline of changes and confirm which information is correct. There are two radio buttons: 'Incoming information is correct' (selected) and 'Existing information is correct'. A blue 'Update' button is visible below the radio buttons.

A green arrow points from the text on the left to the 'Update' button in the main interface. A blue arrow points from the 'Update' button in the main interface to a confirmation modal that is open. The modal is titled 'Update Existing Evidence' and contains the text: 'Student evidence on this case will be updated with changes shared from Income Support case 259.' At the bottom of the modal, there are two buttons: 'Cancel' and 'Update'. The 'Update' button is highlighted with a green box.

Below the modal, there are two side-by-side comparison tables for 'Student' information, both starting on 6/1/2020. The left table shows the current state, and the right table shows the state after the update. The 'Student Status' field in both tables is highlighted in yellow, with 'Part Time' on the left and 'Full Time' on the right.

Field	Current State	Updated State
Effective Date		
Household Member	Maria Hernandez (31)	Maria Hernandez (31)
School Name	Winston Vocational College	Winston Vocational College
School Type	Vocational	Vocational
Highest Grade Completed	High School Diploma	High School Diploma
Current Grade		
Special Program		
Start Date	6/1/2020	6/1/2020
Final Exam Date		
Student Status	Part Time	Full Time
Graduation Date		
Course Name		
End Date		
Work Study	false	false

New Confirmation Banner



A new confirmation banner provides a confirmation message indicating that the incoming evidence is resolved

The evidence has been updated to reflect the student status of part-time

Income Support - 260

Home Overview Eligibility Evidence Eligibility Checks Compliance Participation Time Limits Appeals Case Details Events Administration

Dashboard

Active Evidence Student Maria Hernandez Attends Winston Vocational College Vocational Part Time 6/1/2020 - ELIGIBILITY WORKER on 259

Verifications

Issues

Incoming Evidence

Guided Change

The incoming evidence is resolved.

Incoming Evidence Add as New Ignore

From Income Support case 259

Current Description Attends Winston Vocational College Vocational Part Time

Timeline of changes Select a date to compare 6/1/2020

Student started on 6/1/2020 Edit

Effective Date	
Household Member	Maria Hernandez (31)
School Name	Winston Vocational College
School Type	Vocational
Highest Grade Completed	High School Diploma
Current Grade	
Special Program	
Start Date	6/1/2020
Final Exam Date	
Student Status	Part Time
Graduation Date	
Course Name	
End Date	
Work Study	false
Start Date	
Reason	
End Date	
Comments	

Existing Evidence

On this case

Current Description Attends Winston Vocational College Vocational Part Time

Timeline of changes Select a date to compare 6/1/2020

Student started on 6/1/2020 Delete Existing

Effective Date	
Household Member	Maria Hernandez (31)
School Name	Winston Vocational College
School Type	Vocational
Highest Grade Completed	High School Diploma
Current Grade	
Special Program	
Start Date	6/1/2020
Final Exam Date	
Student Status	Part Time
Graduation Date	
Course Name	
End Date	
Work Study	false
Start Date	
Reason	
End Date	
Comments	

Scenario 2

Timeline Update



Maria Hernandez

Citizen, Client
in receipt of
Income Support



David Nader

Caseworker,
Income Support
Work Queue Based

- Maria reports Living Expenses
 - Food, \$200 monthly, starting 4/1/2020
- Maria applies online for Medical Assistance with Living Expenses:
 - Clothing, \$40 quarterly, starting 9/1/2020
 - Food, \$300 monthly, starting 1/1/2021
- Maria's application is created

Processing Incoming Evidence – Timeline Update



Income Support - 258

Open

- Items To Verify (0)
- Referrals (0)
- Evidence In Edit (1)
- Undisposed Applications (0)
- Recommendations (0)

ELIGIBILITY WORKER

Home Overview Eligibility Evidence Eligibility Checks Compliance Participation Time Limits Appeals Case Details Events Administration

Dashboard

Active Evidence

In Edit Evidence

Verifications

Issues

Incoming Evidence

Guided Change

Incoming Evidence

Living Expense > Contributor	Maria Hernandez	The household incurs \$200.00 Monthly for Food > Is paid \$200.00 Monthly for Food by Maria Hernandez	4/1/2020 -	ELIGIBILITY WORKER on 257
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Choose existing evidence from this case to compare with

- Evidence 1 of 2: The household incurs \$40.00 Quarterly for Clothing > Is paid \$40.00 Quarterly for Clothing by Maria Hernandez

Update Existing Evidence

Review the timeline of changes before you update the existing evidence with information from Income Support case 257. If you don't want to update the existing evidence, choose 'Add as New' or 'Ignore'.

[Update](#)

Incoming Evidence [Add as New](#) [Ignore](#)

From Income Support case 257

Current Description

The household incurs \$200.00 Monthly for Food > Is paid \$200.00 Monthly for Food by Maria Hernandez

Timeline of changes

Select a date to compare: 4/1/2020

Living Expense started on 4/1/2020 [Edit](#)

Existing Evidence

On this case

Current Description

The household incurs \$40.00 Quarterly for Clothing > Is paid \$40.00 Quarterly for Clothing by Maria Hernandez

Timeline of changes

Select a date to compare: 9/1/2020

No change from 4/1/2020 applies to this evidence.

A side-by-side view of the incoming Living Expense/Contributor evidence from both Maria's existing Income Support Case and the new application

Incoming Evidence of Living Expense/Contributor

Comparison View of Living Expense/Contributor evidence

Incoming evidence displayed beside the existing Living Expense / Contributor evidence

New Choose Existing Evidence Card



David now sees a new *Choose Existing Evidence* card notifying him to select the appropriate existing evidence with which to compare the incoming evidence.

Income Support - 258

Open

- Items To Verify (0)
- Referrals (0)
- Evidence In Edit (1)
- Undisposed Applications (0)
- Recommendations (0)

ELIGIBILITY WORKER

Home Overview Eligibility **Evidence** Eligibility Checks Compliance Participation Time Limits Appeals Case Details Events Administration

Dashboard

Active Evidence

In Edit Evidence

Issues

Incoming Evidence

Guided Change

Incoming Evidence

Living Expense > Contributor Maria Hernandex The household incurs \$200.00 Monthly for Food > Is paid \$200.00 Monthly for Food by Maria Hernandex 4/1/2020 - ELIGIBILITY WORKER on 257

Choose existing evidence from this case to compare with

- Evidence 1 of 2: The household incurs \$40.00 Quarterly for Clothing > Is paid \$40.00 Quarterly for Clothing by Maria Hernandex

Update Existing Evidence

Review the timeline of changes before you update the existing evidence with information from Income Support case 257. If you don't want to update the existing evidence, choose 'Add as New' or 'Ignore'.

[Update](#)

Incoming Evidence

From Income Support case 257 [Add as New](#) [Ignore](#)

Current Description
The household incurs \$200.00 Monthly for Food > Is paid \$200.00 Monthly for Food by Maria Hernandex

Timeline of changes Select a date to compare
4/1/2020

Living Expense started on 4/1/2020 [Edit](#)

Existing Evidence

On this case

Current Description
The household incurs \$40.00 Quarterly for Clothing > Is paid \$40.00 Quarterly for Clothing by Maria Hernandex

Timeline of changes Select a date to compare
9/1/2020

No change from 4/1/2020 applies to this evidence.

New Current Description



David now sees a new *Current Description* guiding him in identifying if the incoming and existing evidence being displayed is comparable.

Income Support - 258

Open

- Items To Verify (0)
- Evidence In Edit (1)
- Undisposed Applications (0)
- Recommendations (0)
- Referrals (0)

ELIGIBILITY WORKER

Home Overview Eligibility Evidence Eligibility Checks Compliance Participation Time Limits Appeals Case Details Events Administration

Dashboard

Active Evidence

In Edit Evidence

Verifications

Issues

Incoming Evidence

Guided Change

Incoming Evidence

Living Expense > Contributor	Maria Hernandex	The household incurs \$200.00 Monthly for Food > Is paid \$200.00 Monthly for Food by Maria Hernandex	4/1/2020 -	ELIGIBILITY WORKER on 257
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Choose existing evidence from this case to compare with

- Evidence 1 of 2: The household incurs \$40.00 Quarterly for Clothing > Is paid \$40.00 Quarterly for Clothing by Maria Hernandex

Update Existing Evidence

Review the timeline of changes before you update the existing evidence with information from Income Support case 257. If you don't want to update the existing evidence, choose 'Add as New' or 'Ignore'.

[Update](#)

Incoming Evidence

From Income Support case 257

[Add as New](#) [Ignore](#)

Current Description

The household incurs \$200.00 Monthly for Food > Is paid \$200.00 Monthly for Food by Maria Hernandex

Timeline of changes

Select a date to compare

4/1/2020

Living Expense started on 4/1/2020 [Edit](#)

Existing Evidence

On this case

Current Description

The household incurs \$40.00 Quarterly for Clothing > Is paid \$40.00 Quarterly for Clothing by Maria Hernandex

Timeline of changes

Select a date to compare

9/1/2020

No change from 4/1/2020 applies to this evidence.

New Choose Existing Evidence Card



David uses the new *Choose Existing Evidence* card to scroll to the next Living Expense evidence.

Income Support - 258

Home Overview Eligibility **Evidence** Eligibility Checks Compliance Participation Time Limits Appeals Case Details Events Administration

Dashboard

Active Evidence **Incoming Evidence** Living Expense > Contributor Maria Hernandez The household incurs \$200.00 Monthly for Food > Is paid \$200.00 Monthly for Food by Maria Hernandez 4/1/2020 - ELIGIBILITY WORKER on 257

In Edit Evidence

Verifications

Issues

Incoming Evidence

Guided Change

Choose existing evidence from this case to compare with

Evidence 2 of 2: The household incurs \$300.00 Monthly for Food > Is paid \$300.00 Monthly for Food by Maria Hernandez

Update Existing Evidence

Review the timeline of changes before you update the existing evidence with information from Income Support case 257. If you don't want to update the existing evidence, choose 'Add as New' or 'Ignore'.

[Update](#)

Incoming Evidence [Add as New](#) [Ignore](#)

From Income Support case 257

Current Description

The household incurs \$200.00 Monthly for Food > Is paid \$200.00 Monthly for Food by Maria Hernandez

Timeline of changes [Select a date to compare](#) 4/1/2020

Living Expense started on 4/1/2020 [Edit](#)

Effective Date	
Living Expense Type	Food
Total Expense Amount	\$200.00
Start Date	4/1/2020
Frequency	Monthly
End Date	

Existing Evidence

On this case

Current Description

The household incurs \$300.00 Monthly for Food > Is paid \$300.00 Monthly for Food by Maria Hernandez

Timeline of changes [Select a date to compare](#) 1/1/2021

No change from 4/1/2020 applies to this evidence. To view evidence on this case, select a date on the timeline. To add this and all other missing changes to this evidence, choose 'Update'.

New Current Description



Income Support - 258

Home Overview Eligibility **Evidence** Eligibility Checks Compliance Participation Time Limits Appeals Case Details Events Administration

Dashboard
Active Evidence
In Edit Evidence
Verifications
Issues
Incoming Evidence
Guided Change

Incoming Evidence

Living Expense > Contributor Maria Hernandez The household incurs \$200.00 Monthly for Food > Is paid \$200.00 Monthly for Food by Maria Hernandez 4/1/2020 - ELIGIBILITY WORKER on 257

Choose existing evidence from this case to compare with

Evidence 2 of 2: The household incurs \$300.00 Monthly for Food > Is paid \$300.00 Monthly for Food by Maria Hernandez

Update Existing Evidence

Review the timeline of changes before you update the existing evidence with information from Income Support case 257. If you don't want to update the existing evidence, choose 'Add as New' or 'Ignore'.

[Update](#)

Incoming Evidence [Add as New](#) [Ignore](#)

From Income Support case 257

Current Description

The household incurs \$200.00 Monthly for Food > Is paid \$200.00 Monthly for Food by Maria Hernandez

Timeline of changes [Select a date to compare](#)
4/1/2020

Living Expense started on 4/1/2020 [Edit](#)

Effective Date	
Living Expense Type	Food
Total Expense Amount	\$200.00
Start Date	4/1/2020
Frequency	Monthly
End Date	

Existing Evidence

On this case

Current Description

The household incurs \$300.00 Monthly for Food > Is paid \$300.00 Monthly for Food by Maria Hernandez

Timeline of changes [Select a date to compare](#)
1/1/2021

No change from 4/1/2020 applies to this evidence.
To view evidence on this case, select a date on the timeline.
To add this and all other missing changes to this evidence, choose 'Update'.

A new *Current Description* of the evidence to help David confirm that he has selected the correct existing evidence when multiple exist

New Update Existing Evidence Card



The new *Update Existing Evidence* card displays information and options relevant to the incoming and existing evidence being compared.

Income Support - 258

Home Overview Eligibility **Evidence** Eligibility Checks Compliance Participation Time Limits Appeals Case Details Events Administration

Dashboard Incoming Evidence

Active Evidence

In Edit Evidence

Verifications

Issues

Incoming Evidence

Guided Change

Update Existing Evidence

Review the timeline of changes before you update the existing evidence with information from Income Support case 257.
If you don't want to update the existing evidence, choose 'Add as New' or 'Ignore'.

Informational Message

No Radio Buttons

Incoming Evidence

From Income Support case 257 [Add as New](#) [Ignore](#)

Current Description
The household incurs \$200.00 Monthly for Food > Is paid \$200.00 Monthly for Food by Maria Hernandez

Timeline of changes Select a date to compare
4/1/2020

Living Expense started on 4/1/2020 [Edit](#)

Effective Date	
Living Expense Type	Food
Total Expense Amount	\$200.00
Start Date	4/1/2020
Frequency	Monthly
End Date	
Comments	

Contributor started on 4/1/2020 [Edit](#)

Effective Date	
Contributor Participant	Maria Hernandez (31)

Existing Evidence

On this case

Current Description
The household incurs \$40.00 Quarterly for Clothing > Is paid \$40.00 Quarterly for Clothing by Maria Hernandez

Timeline of changes Select a date to compare
9/1/2020

No change from 4/1/2020 applies to this evidence.
To view evidence on this case, select a date on the timeline.
To add this and all other missing changes to this evidence, choose 'Update'.

Enhanced *Timeline of Changes* View



A new enhanced timeline of changes view helps David compare and process the evidence.

David is guided with labels and informational messages, and options relevant to the evidence being compared.

Income Support - 258

Home Overview Eligibility **Evidence** Eligibility Checks Compliance Participation Time Limits Appeals Case Details Events Administration

Dashboard Incoming Evidence

Update Existing Evidence
Review the timeline of changes before you update the existing evidence with information from Income Support case 257. If you don't want to update the existing evidence, choose 'Add as New' or 'Ignore'.
[Update](#)

Incoming Evidence From Income Support case 257 [Add as New](#) [Ignore](#)

Current Description
The household incurs \$200.00 Monthly for Food > Is paid \$200.00 Monthly for Food by Maria Hernandez

Timeline of changes ← **Timeline Labels** → **Select a date to compare**
4/1/2020

Living Expense started on 4/1/2020 [Edit](#)

Effective Date	
Living Expense Type	Food
Total Expense Amount	\$200.00
Start Date	4/1/2020
Frequency	Monthly
End Date	
Comments	
Contributor started on 4/1/2020	Edit
Effective Date	
Contributor Participant	Maria Hernandez (31)

Existing Evidence On this case

Current Description
The household incurs \$40.00 Quarterly for Clothing > Is paid \$40.00 Quarterly for Clothing by Maria Hernandez

Timeline of changes **Select a date to compare**
9/1/2020

Informational Message
No change from 4/1/2020 applies to this evidence. To view evidence on this case, select a date on the timeline. To add this and all other missing changes to this evidence, choose 'Update'.

Informational Message
No evidence placed into focus because no existing evidence has a date of 4/1/2020

Enhanced *Timeline of Changes* View



David selects the date in the timeline of changes view for the Existing evidence record that started on 9/1/2020.

Income Support - 258

Home Overview Eligibility **Evidence** Eligibility Checks Compliance Participation Time Limits Appeals Case Details Events Administration

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Guided Change

Incoming Evidence

Update Existing Evidence
Review the timeline of changes before you update the existing evidence with information from Income Support case 257.
If you don't want to update the existing evidence, choose 'Add as New' or 'Ignore'.

Incoming Evidence	Existing Evidence																				
<p>From Income Support case 257</p> <p>Current Description The household incurs \$200.00 Monthly for Food > Is paid \$200.00 Monthly for Food by Maria Hernandex</p> <p>Timeline of changes Select a date to compare 4/1/2020</p> <p>No change from 9/1/2020 applies to this evidence.</p>	<p>On this case</p> <p>Current Description The household incurs \$40.00 Quarterly for Clothing > Is paid \$40.00 Quarterly for Clothing by Maria Hernandex</p> <p>Timeline of changes Select a date to compare 9/1/2020</p> <p>Living Expense started on 9/1/2020 Delete Existing</p> <table border="1"><tr><td>Effective Date</td><td></td></tr><tr><td>Living Expense Type</td><td>Clothing</td></tr><tr><td>Total Expense Amount</td><td>\$40.00</td></tr><tr><td>Start Date</td><td>9/1/2020</td></tr><tr><td>Frequency</td><td>Quarterly</td></tr><tr><td>End Date</td><td></td></tr><tr><td>Comments</td><td></td></tr><tr><td>Contributor</td><td>started on 9/1/2020 Delete Existing</td></tr><tr><td>Effective Date</td><td></td></tr><tr><td>Contributor Participant</td><td>Maria Hernandex (31)</td></tr></table>	Effective Date		Living Expense Type	Clothing	Total Expense Amount	\$40.00	Start Date	9/1/2020	Frequency	Quarterly	End Date		Comments		Contributor	started on 9/1/2020 Delete Existing	Effective Date		Contributor Participant	Maria Hernandex (31)
Effective Date																					
Living Expense Type	Clothing																				
Total Expense Amount	\$40.00																				
Start Date	9/1/2020																				
Frequency	Quarterly																				
End Date																					
Comments																					
Contributor	started on 9/1/2020 Delete Existing																				
Effective Date																					
Contributor Participant	Maria Hernandex (31)																				

Informational Message

No evidence placed into focus because no incoming evidence has a date of 9/1/2020.

New Contextual Confirmation Modals



David confirms he wants to update the timeline of the existing evidence to include the history of Maria's living expense and selects the Update action.

Contextual informational messages explain what will happen.

Income Support - 258

Home Overview Eligibility **Evidence** Eligibility Checks Compliance Participation Time Limits Appeals Case Details Events Administration

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Update Existing Evidence

Review the timeline of changes before you update the existing evidence with information from Income Support case 257. If you don't want to update the existing evidence, choose 'Add as New' or 'Ignore'.

Update

Incoming Evidence

From Income Support case 257

Current Description

The household incurs \$200.00 Monthly Hernandex

Timeline of changes

← ————— →

No change from 9/1/2020 applies to this evid

Update Existing Evidence

Living Expense and Contributor evidence on this case will be updated with changes shared from Income Support case 257.

The start date of Living Expense evidence will be updated to 01/04/2020. This update might affect eligibility.

The start date of Contributor evidence will be updated to 01/04/2020. This update might affect eligibility.

Cancel Update

Contributor Participant Maria Hernandex (31)

New Confirmation Banner



Income Support - 258

Home Overview Eligibility **Evidence** Eligibility Checks Compliance Participation Time Limits Appeals Case Details Events Administration

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Active Evidence **Incoming Evidence** Existing Evidence

In Edit Evidence

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Guided Change

Incoming Evidence

Living Expense > Contributor Maria Hernandex The household incurs \$200.00 Monthly for Food > Is paid \$200.00 Monthly for Food by Maria Hernandex 4/1/2020 - ELIGIBILITY WORKER on 257

✓ The incoming evidence is resolved.

Incoming Evidence

From Income Support case 257 Add as New Ignore

Current Description

The household incurs \$200.00 Monthly for Food > Is paid \$200.00 Monthly for Food by Maria Hernandex

Timeline of changes Select a date to compare

4/1/2020

No change from 1/1/2021 applies to this evidence.

Existing Evidence

On this case

Current Description

The household incurs \$300.00 Monthly for Food > Is paid \$300.00 Monthly for Food by Maria Hernandex

Timeline of changes Select a date to compare

1/1/2021

4/1/2020

Living Expense changed on 1/1/2021 Delete Existing

Effective Date 1/1/2021

Living Expense Type Food

Total Expense Amount \$300.00

Start Date 4/1/2020

Frequency Monthly

End Date

Comments

Contributor changed on 1/1/2021 Delete Existing

Effective Date 1/1/2021

Contributor Participant Maria Hernandex (31)

Start Date 4/1/2020

Expense Amount \$300.00

New Confirmation Banner provides a confirmation message indicating that the incoming evidence is resolved.

The Incoming evidence record with the start date of 4/1/2020 has been added to the beginning of the timeline on the existing case.

The start date of the evidence record that previously had a start date of 1/1/2021 has been updated to 4/1/2020.

Scenario 3

Processing Logically Equivalent

Incoming Evidence



Maria Hernandez

Citizen, Client
in receipt of
Income Support



David Nader

Caseworker,
Income Support
Work Queue Based

- Maria is also receiving Streamlined Medicaid benefits from the agency within an Insurance Affordability case that David does not manage.
- Maria's Insurance Affordability case includes Benefit evidence related to a Medicare benefit she started receiving on 5/1/2020, which then changed on 8/1/2020 due to a move to another state.

Scenario 3

Processing Logically Equivalent

Incoming Evidence



Maria Hernandez

Citizen, Client
in receipt of
Income Support



David Nader

Caseworker,
Income Support
Work Queue Based

- When Maria's new application for Medical Assistance benefits was created, the Benefit evidence in the Insurance Affordability case was shared.
- Because Benefit evidence is configured to share between an Insurance Affordability and Income Support case as Logically Equivalent evidence, it is missing information that must be provided before it can be added to the new application.

New Information Is Missing Card



David navigates to the Incoming Evidence page and sees that there is Benefit incoming evidence on his case.

Because there is missing information, David is now presented with a new *Information is Missing* card.

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Incoming Evidence

Benefit Maria Hernandex Receives Medicare Part B valued at \$0.00 FrequencyCode: 5/1/2020 - HCR CASE WORKER on 260

Information is missing from 2 timeline changes

Before you can add the incoming evidence to this case, you must edit each change on the incoming evidence timeline and add the required information.

Incoming Evidence

From Insurance Affordability case 260 [Add as New](#) [Ignore](#)

Current Description
Receives Medicare Part B valued at \$0.00 FrequencyCode:

Timeline of changes

Select a date to compare (Information missing) 5/1/2020 8/1/2020

Benefit changed on 8/1/2020 [Edit](#)

Effective Date	8/1/2020
Participant	Maria Hernandex (31)
Benefit Type	Medicare Part B
Start Date	5/1/2020
End Date	
End Reason	
State	Utah
Application Date	
Last Payment Date	
Amount	\$0.00
Delivery Type	Information missing
Rate Payable	\$0.00
Frequency	Information missing
Pay Day	
Aid Mobility Indicator	false
Aid Personal Care Indicator	false

Existing Evidence

No relevant evidence exists on this case to compare against.

New Information Missing Labels



In an enhanced timeline of changes view, a new *Information Missing* label displays above the dates where information is missing, and beside the attributes where the information is missing.

Income Support - 258

Home Overview Eligibility Evidence Eligibility Checks Compliance Participation Time Limits Appeals Case Details Events Administration

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Incoming Evidence

Benefit Maria Hernandez Receives Medicare Part B valued at \$0.00 FrequencyCode: 5/1/2020 - HCR CASE WORKER on 260

Information is missing from 2 timeline changes
Before you can add the incoming evidence to this case, you must edit each change on the incoming evidence timeline and add the required information.

Incoming Evidence From Insurance Affordability case 260 [Add as New](#) [Ignore](#)

Current Description
Receives Medicare Part B valued at \$0.00 FrequencyCode:

Timeline of changes

(Information missing) 5/1/2020 (Information missing) 8/1/2020 [Select a date to compare \(Information missing\) 8/1/2020](#)

Benefit changed on 8/1/2020 [Edit](#)

Effective Date	8/1/2020
Participant	Maria Hernandez (31)
Benefit Type	Medicare Part B
Start Date	5/1/2020
End Date	
End Reason	
State	Utah
Application Date	
Last Payment Date	
Amount	\$0.00
Delivery Type	Information missing
Rate Payable	\$0.00
Frequency	Information missing
Pay Day	
Aid Mobility Indicator	false
Aid Personal Care Indicator	false

Existing Evidence

No relevant evidence exists on this case to compare against.

New Information Missing Labels



David selects the 8/1/2020 date on the timeline so that he can provide the missing information.

David then selects **Edit** and provides the missing information.

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Incoming Evidence

Benefit Maria Hernandez Receives Medicare Part B valued at \$0.00 FrequencyCode: 5/1/2020 - HCR CASE WORKER on 260

Information is missing from 2 timeline changes

Before you can add the incoming evidence to this case, you must edit each change on the incoming evidence timeline and add the required information.

Incoming Evidence

From Insurance Affordability case 260

Current Description: Receives Medicare Part B valued at \$0.00 FrequencyCode:

Timeline of changes

(Information missing) 5/1/2020

Select a date to compare (Information missing) 8/1/2020

Benefit changed on 8/1/2020

Edit

Effective Date	8/1/2020
Participant	Maria Hernandez (31)
Benefit Type	Medicare Part B
Start Date	5/1/2020
End Date	
End Reason	
State	Utah
Application Date	
Last Payment Date	
Amount	\$0.00
Delivery Type	Information missing
Rate Payable	\$0.00
Frequency	Information missing
Pay Day	
Aid Mobility Indicator	false
Aid Personal Care Indicator	false

Edit Benefit Evidence

Change Details

Received Date: 07/09/2021

Change Reason: Supported by Client

Effective Date of Change: 08/09/2020

Benefit Details

Participant: Maria Hernandez (31)

Benefit Type: Medicare Part B

Start Date: 08/09/2020

End Date: N/A/YYYY

End Reason:

State: Utah

Application Date: N/A/YYYY

Last Payment Date: N/A/YYYY

Delivery Details

Amount: \$0.00

Frequency: Bi-weekly

Cancel Save

New Information Missing Labels



David sees that the *Information Missing* label above the 8/1/2020 date on the timeline of changes has been removed, as well as the yellow icon and *Information Missing* label beside each evidence attribute that was previously missing.

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Incoming Evidence

Benefit Maria Hernandez Receives Medicare Part B valued at \$0.00 FrequencyCode: 5/1/2020 - [HCR CASE WORKER on 260](#)

Information is missing from 1 timeline change
Before you can add the incoming evidence to this case, you must edit each change on the incoming evidence timeline and add the required information.

Incoming Evidence [Add as New](#) [Ignore](#)

From Insurance Affordability case 260

Current Description
Receives Medicare Part B valued at \$100.00 Bi-Weekly

Timeline of changes

(Information missing) 5/1/2020 **Select a date to compare** 8/1/2020

Benefit changed on 8/1/2020 [Edit](#)

Effective Date	8/1/2020
Participant	Maria Hernandez (31)
Benefit Type	Medicare Part B
Start Date	5/1/2020
End Date	
End Reason	
State	Utah
Application Date	
Last Payment Date	
Amount	\$100.00
Delivery Type	Check
Rate Payable	\$0.00
Frequency	Bi-Weekly
Pay Day	
Aid Mobility Indicator	false
Aid Personal Care Indicator	false

New Information Is Missing Card



After providing all missing information David now sees that the *Information is Missing* card is no longer displayed and the **Add as New** action is now enabled.

David clicks the **Add as New** option to add the Benefit evidence to his case.

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Home Overview Eligibility **Evidence** Eligibility Checks Compliance Participation Time Limits Appeals Case Details Events Administration

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Active Evidence **Incoming Evidence** In Edit Evidence Verifications Issues Incoming Evidence Guided Change

Incoming Evidence Maria Hernandez Receives Medicare Part B valued at \$0.00 FrequencyCode: 5/1/2020 - [HCR CASE WORKER on 260](#)

Incoming Evidence From Insurance Affordability case 260 [Add as New](#) [Ignore](#)

Current Description Receives Medicare Part B valued at \$100.00 Bi-Weekly

Timeline of changes Select a date to compare

5/1/2020 8/1/2020

Benefit changed on 5/1/2020 [Edit](#)

Effective Date	8/1/2020
Participant	Maria Hernandez (31)
Benefit Type	Medicare Part B
Start Date	5/1/2020
End Date	
End Reason	
State	Utah
Application Date	
Last Payment Date	
Amount	\$100.00
Delivery Type	Check
Rate Payable	\$0.00
Frequency	Bi-Weekly
Pay Day	
Aid Mobility Indicator	false
Aid Personal Care Indicator	false
Public Office	Midway Head Office
Indian Country Indicator	false
Benefit Usage	
Deduction Type	

Existing Evidence

No relevant evidence exists on this case to compare against.

Summary of Benefits

SPM version 8.0.0 introduces several improvements to the user experience when processing incoming evidence that is comparable to existing evidence.

Processing is faster because David can now process the incoming evidence in fewer steps using a single Update action.

- All evidence records, including changes over time and parent-child, are processed in bulk.
- Timelines are automatically updated, including start dates, where required.

David is guided through the process based on the evidence compared.

- Choose *Existing Evidence*, *Update Existing Evidence*, and *Missing Information* cards
- Contextual Confirmation modals
- Enhanced timeline of changes view



David Nader

Technical Updates

Improved Server-Side Logic for Incoming Evidence Actions

Before V8.0.0, users were required to navigate through a multi-step process to action incoming evidence as a correction or a succession to existing evidence. Version 8.0.0 introduces a range of improvements.

- Improved server-side logic for more automation and a better user experience
- Entire business object processed in a single action
- Automated, deterministic creation of updated timelines
- Enhanced filtering of existing evidence records
- Reduced four different types of processing to one **Update** action

No extra configuration is required for the V8.0.0 improvements. In addition, there are no new customization points.

The next two slides provide more information about enhanced filtering of existing evidence records and reduced processing that consists of one **Update** action.

Enhanced Filtering of Existing Evidence records

Filtering has been enhanced to prevent the display of unnecessary evidence on the Existing Evidence side.

- Filter-out parent-child evidence where parent is not the same evidence type
- Filter-out where the case participants are different for parent evidence
- Only display previously linked evidence

Active Evidence			
Type	Participant	Description	Period
> Unearned Income	Maria Hernandez	Alimony valued at \$100.00 Monthly	4/1/2021 -
> Unearned Income	Maria Hernandez	Child Nutrition Program valued at \$50.00 Monthly	2/15/2021 -

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Open

- Items To Verify (2)
- Evidence In Edit (1)
- Undisposed Applications (0)
- Recommendations (0)
- Referrals (0)

Maria Hernandez Primary 31 years ELIGIBILITY WORKER

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Incoming Evidence

Unearned Income Maria Hernandez Alimony valued at \$120.00 Monthly 4/1/2021 - ELIGIBILITY WORKER on 260

Update Existing Evidence

Review the timeline of changes before you update the existing evidence with information from Income Support case 260. If you don't want to update the existing evidence, choose 'Add as New' or 'Ignore'.

Resolve 1 conflict

Review where information is different and confirm which information is correct.

Incoming information is correct Existing information is correct

[Update](#)

Incoming Evidence

From Income Support case 260 [Add as New](#) [Ignore](#)

Current Description

Alimony valued at \$120.00 Monthly

Timeline of changes

Select a date to compare (Conflict) 4/1/2021

Unearned Income started on 4/1/2021 [Edit](#)

Existing Evidence

On this case

Current Description

Alimony valued at \$100.00 Monthly

Timeline of changes

Select a date to compare (Conflict) 4/1/2021

Unearned Income started on 4/1/2021 [Delete Existing](#)

Only Unearned Income of type Alimony is displayed

Reduced Processing to one **Update** Action

Four different types of processing are now handled by the new Update action.

Existing Evidence Evidence 1 of 1

6/1/2020

Student

Effective Date	
Household Member	Maria Hernandez (31)
School Name	Winstons Vocational College
School Type *	Vocational

Actions

- Update with Incoming
- Set as Latest of Incoming
- Delete Existing

V7.0.11

Incoming Evidence

Student Maria Hernandez Attends Wilson Vocational School Vocational

Update Existing Evidence
Review the timeline of changes before you update the existing evidence with information from Income Support case 264. If you don't want to update the existing evidence, choose 'Add as New' or 'Ignore'.

Resolve 1 conflict
Review where information is different and confirm which information is correct.

Incoming information is correct Existing information is correct

Update

V8.0.0

The Update action now automatically handles the following types of processing:

- Set as latest of incoming/Correction
- Set as latest of incoming/New Version
- Update with incoming/Correction
- Update with incoming/New Version

Where to Find More Information

- IBM Documentation
 - *What's New in Social Program Management – Evidence Broker Improvements*
 - *Evidence guide – Reviewing evidence on a case's incoming list*
- IBM Support
 - *Evidence: your questions answered (FAQs)*
<https://www.ibm.com/support/pages/node/6359609>



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