

# Person Evidence Management

## 8.1.1

Enablement material

# Agenda

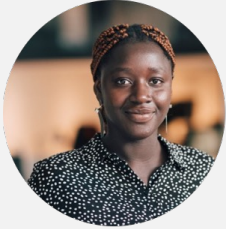
1. Introduction
2. Business Overview
3. Change of Circumstances
4. Technical Overview
5. Upgrade Considerations
6. Where to Find More Information

# Introduction

- Person Evidence Management is a separately licensed module.
- Person Evidence Management integrates with platform business processes. As of v8.1.1 this module is not supported with the Curam Income Support module, the Curam Income Support for Medical Assistance module or the Curam Child Welfare module.
- Extending the offering to all our solutions; Income Support, Insurance Affordability, Child Welfare and Workers Compensation, will be based on customer interest.

# Business Overview

# Who do we serve



***Emma Harris***

Delivery of Benefits  
Caseworker; case  
ownership model



***David Nadar***

Delivery of Benefits  
Caseworker; work  
queue driven  
model

Targeting all caseworkers who  
manage person evidence; both  
Emma and David.

# Person Evidence Management

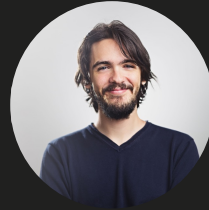
- Person Evidence Management allows person evidence to be managed centrally independent of any benefit.
- Where an agency can streamline verification requirements, Person Evidence Management allows an agency to verify this data once only for use on any application, providing efficiency gains to the agency.
- This person centric approach is especially advantageous to customers delivering benefits across multiple integrated cases:
  - Benefit access can be restricted to only the caseworkers who need it, to ensure data privacy of citizens, without impact on caseworkers having visibility on the latest person evidence.
  - All caseworkers have access to person evidence regardless of status and will not be asking citizens for evidence that has already been submitted to the agency.
  - Support for digital updates to person evidence extended by removing the correlation to benefit delivery or entitlement.
- In general, evidence types should not be maintained at the person level where they have benefit specific verifications requirements. These evidence types can be maintained within an integrated case.

# Change of circumstance

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

David the caseworker, will change Maria's address.

This enhancement allows David to make the change within Maria's person profile where it can immediately be available to all other caseworkers



David Nadar  
Delivery of Benefits, Caseworker

# Change of circumstance

Cúram

Home Cases and Outcomes Inbox Calendar

Maria Hernandez x

Maria Hernandez

456 Orange, Midway, Utah, 84045  
Female  
Born 1/1/1996, Age 28

30000003

(0) Evidence In Edit  
(0) Items to Verify

Not Recorded Not Recorded

Home Evidence Care and Protection Issues and Proceedings Financial Transactions Referrals Client Contact Administration

Dashboard

Participant Data

- Addresses
- Bank Accounts
- Contact Preferences

- Email Addresses
- Gender Details
- Identifications

- Names
- Phone Numbers
- Relationships

All Recorded

### New Evidence

Select an evidence type for creation

Category: All

Type	Description	
Addresses	Record addresses for the client such as their private and mailing address.	<a href="#">Add...</a>
Bank Accounts	Record details of any bank accounts held by the client.	<a href="#">Add...</a>
Contact Preferences	Records the preferred contact type when corresponding and language.	<a href="#">Add...</a>
Email Addresses	Record email addresses that can be used when communicating with the client.	<a href="#">Add...</a>
Gender Details	Record the gender of the client.	<a href="#">Add...</a>
Identifications	Record different types of identification for the client such as passport.	<a href="#">Add...</a>
Names	Record any names the client uses such as registered name or alternative names.	<a href="#">Add...</a>

Close



# Change of circumstance

### New Addresses

Case Participant  
Maria Hernandez (28)

#### Address Details

Type \*  
Private

From \* 3/5/2024 To M/d/yyyy

Please enter either Apt/Suite or Street 1.

Apt/Suite Street 1  
123 Lemon

Street 2 City  
Midway

State Utah Zip 84045

Preferred

Cancel Save & Exit Save & Next

### New Addresses

\* required field

1 New Addresses 2 End Existing Addresses

#### End Addresses

Change Reason  
Case Audit

Evidence End Date  
3/4/2024

#### End Existing Addresses

Select any record(s) which require an end date

<input checked="" type="checkbox"/>	Name	Evidence Description	Period
<input checked="" type="checkbox"/>	Maria Hernandez (28)	Private address is 456 Orange, Midway, Utah, 84045	3/1/2024 -

Cancel Finish

# Change of circumstance

The screenshot displays the Cúram software interface. At the top, the header includes the Cúram logo, navigation tabs (Home, Cases and Outcomes, Inbox, Calendar), a search bar with the text "Enter Name or Ref. Number or Keyw", and a user profile for "Welcome SUPER USER".

The main content area shows a profile for "Maria Hernandez" with a placeholder image, name, address (456 Orange, Midway, Utah, 84045), gender (Female), and birth date (Born 1/1/1996, Age 28). There are two "Not Recorded" status indicators. To the right, a summary box shows the ID "30000003" and two items: "(2) Evidence In Edit" and "(2) Items to Verify", both highlighted with a red box. Below this is a "SUPER USER" label.

The "Evidence" tab is active, showing a "Dashboard" with a left sidebar containing "Dashboard", "Active Evidence", "In-Edit Evidence", "Verifications", "Issues", and "Incoming Evidence". The dashboard content includes a "Participant Data" section with a red box around the "Addresses" link (which has a pencil icon), and other links for "Email Addresses", "Gender Details", and "Identifications". To the right, there are filters for "All" (selected), "Recorded", and "New Evidence", "Open In New Tab", "Issue", "Items to Verify", and "Evidence In Edit".

# Change of circumstance

Maria's address change is in an in-edit state awaiting the necessary verification. A few days later, Maria provides the required proof of address to the government agency.

Emma the caseworker, will now verify the address change for Maria.

Again, this change is made within Maria's person profile where it can immediately be available to all other caseworkers



**Emma Harris**  
Delivery of Benefits, Caseworker


# Change of circumstance

Cúram Enter Name or Ref. Number or Keyw Welcome SUPER USER

Home **Cases and Outcomes** Inbox Calendar

Maria Hernandez x

**Maria Hernandez** Edit... New Application Case...

 **Maria Hernandez** 30000003

456 Orange, Midway, Utah, 84045  
Female  
Born 1/1/1996, Age 28

Not Recorded Not Recorded

(2) Evidence In Edit  
(2) Items to Verify

Home Evidence Care and Protection Issues and Proceedings Financial Transactions Referrals Client Contact Administration

**Home** Add Picture

Sensitivity	1	Special Interest	
Preferred Public Office		Registration Date	3/5/2024

**Receive Deduction Payment Details**

Currency	Method Of Payment
Payment Frequency	Next Payment Date

**Comments**

**Pending Application Cases** **Current Cases**

# Change of circumstance


**Cúram** Enter Name or Ref. Number or Keyw Welcome SUPER USER

Home **Cases and Outcomes** Inbox Calendar

Maria Hernandez x

### Maria Hernandez

30000003

 **Maria Hernandez**  
456 Orange, Midway, Utah, 84045  
Female  
Born 1/1/1996, Age 28

Not Recorded Not Recorded

[Edit...](#) [New Application Case...](#) ...



(2) Evidence In Edit  
(2) Items to Verify

SUPER USER

Home **Evidence** Care and Protection Issues and Proceedings Financial Transactions Referrals Client Contact Administration

### In Edit Evidence

[New Evidence](#) [Open In New Tab](#) ...

Type	Description	Period	Latest Activity
>  <a href="#">Addresses</a>	Private address is 123 Lemon, Midway, Utah, 84045	3/5/2024 -	Created by SUPER USER on 3/5/2024
>  <a href="#">Addresses</a>	Private address is 456 Orange, Midway, Utah, 84045	3/1/2024 - 3/4/2024	In Edit by SUPER USER on 3/5/2024

Smart Panel

# Change of circumstance

Cúram Enter Name or Ref. Number or Keyw Welcome SUPER USER


Home **Cases and Outcomes** Inbox Calendar

Maria Hernandez x

### Maria Hernandez

30000003

[Edit...](#) [New Application Case...](#)



**Maria Hernandez**  
456 Orange, Midway, Utah, 84045  
Female  
Born 1/1/1996, Age 28

Not Recorded Not Recorded

(2) Evidence In Edit  
 (2) Items to Verify

SUPER USER

Home **Evidence** Care and Protection Issues and Proceedings Financial Transactions Referrals Client Contact Administration

## Verifications

[Verify](#)

[Outstanding](#) [All](#)

Item for Verification	Evidence Type	Mandatory	Due Date
> State	Addresses	Yes	<a href="#">Add Proof</a>
> State	Addresses	Yes	<a href="#">Add Proof</a>

Dashboard  
Active Evidence  
In-Edit Evidence  
**Verifications**  
Issues  
Incoming Evidence

Smart Panel

# Change of circumstance

**Cúram** Enter Name or Ref. Number or Keyw Welcome SUPER USER

Home Cases and Outcomes Inbox Calendar

Maria Hernandez x

Maria Hernandez 30000003

(2) Evidence In Edit  
(0) Items to Verify

456 Orange, Midway, Utah, 84045  
Female  
Born 1/1/1996, Age 28

Not Recorded Not Recorded

SUPER USER

Home Evidence Care and Protection Issues and Proceedings Financial Transactions Referrals Client Contact Administration

Dashboard

Participant Data

- Addresses
- Bank Accounts
- Contact Preferences

Email Addresses

- Gender Details
- Identifications

Smart Panel

- New Evidence
- Open In New Tab
- Apply Changes...
- Edit
- Validate Changes...

**Cúram** Enter Name or Ref. Number or Keyw Welcome SUPER USER

Home Cases and Outcomes Inbox Calendar

Maria Hernandez x

Maria Hernandez 30000003

(0) Evidence In Edit  
(0) Items to Verify

123 Lemon, Midway, Utah, 84045  
Female  
Born 1/1/1996, Age 28

Not Recorded Not Recorded

SUPER USER

Home Evidence Care and Protection Issues and Proceedings Financial Transactions Referrals Client Contact Administration

Dashboard

Active Evidence

Active Evidence

Type	Description	Period	Updates	Latest Activity
> Addresses	Private address is 123 Lemon, Midway, Utah, 84045	3/5/2024 -	1	SUPER USER on 3/5/2024 17:55
> Addresses	Private address is 456 Orange, Midway, Utah, 84045	3/1/2024 - 3/4/2024	1	SUPER USER on 3/5/2024 17:55
> Birth and Death Details	Born 1/1/1996	3/5/2024 -	1	SUPER USER on 3/5/2024 16:32
> Gender Details	Female	3/5/2024 -	1	SUPER USER on 3/5/2024 16:32
> Identifications	Reference Number 30000003	3/5/2024 -	1	SUPER USER on 3/5/2024 16:32
> Names	Maria Hernandez is the Registered name for this client.	3/5/2024 -	1	SUPER USER on 3/5/2024 16:32

Smart Panel

# Technical Overview



# Person Evidence Management

- Person Evidence Management utilizes a new case construct Person Evidence Case (PEC) to deliver the evidence workspace.
  - It allows for person evidence captured at the Person level to make use of the full evidence lifecycle to support the centralization of person evidence.
  - It is a system level case not visible to users of the application.
  - It is a new/separate case which is a new, additional layer on top of existing participant data case.
  - Tight synchronization between these two cases provided for the 10 out-of-the-box evidence types ensure any existing usage of person evidence is unimpacted.

*The 10 out-of-the-box evidence types are:*

- ✓ *Addresses*
- ✓ *Birth and Death Details*
- ✓ *Gender*
- ✓ *Identifications*
- ✓ *Names*
- ✓ *Contact Preferences*
- ✓ *Phone Numbers*
- ✓ *Relationships*
- ✓ *Bank Accounts*
- ✓ *Email Addresses*

# Using Person Evidence Management

- Administrators can enable Person Evidence Management processing by setting the system property in the administration application to YES. By default this property is set to NO.

**Note:** Once enabled, we recommend that you do not disable Person Evidence Management as enabling it determines a way of managing person and prospect persons.

- When Person Evidence Management processing is enabled, administrators can configure evidence, verifications, and the smart navigator.

<i>Sysadmin properties</i>	<i>Default value</i>	<i>Description</i>
Enable Person Evidence Case (curam.pec.enabled)	NO	Determines whether Person Evidence Management is enabled for persons/prospect persons.
Enable Demographics (curam.pec.demographicsenabled)	NO	Determines whether the demographics tab is enabled for persons with an underlying person evidence case.

# Using Person Evidence Management

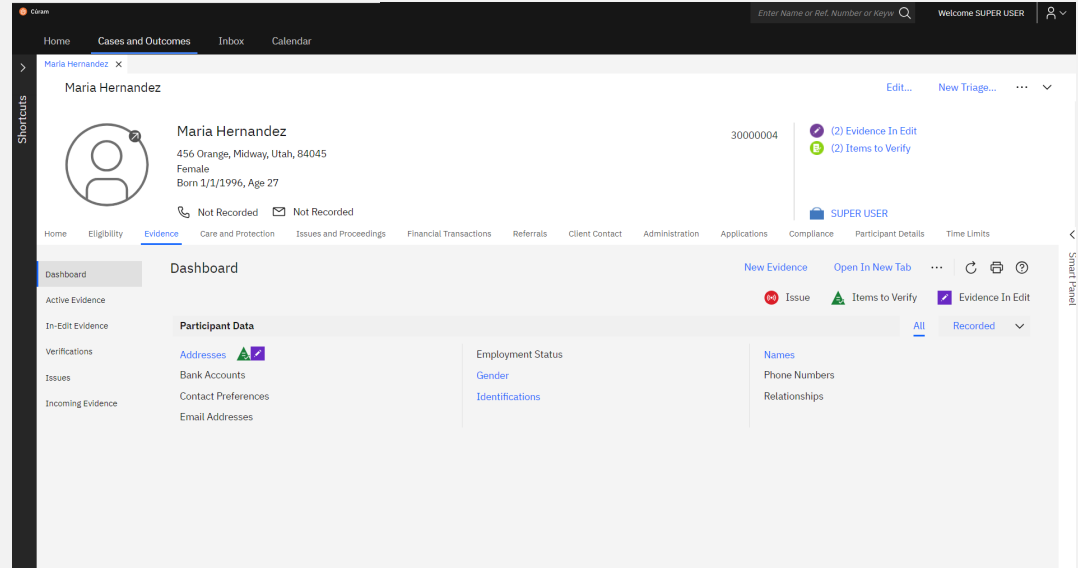
- Person Evidence Management provides a full evidence lifecycle for all evidence types that are configured for a person or prospect person, enabling maintenance of evidence at the person level.
- An evidence dashboard view and active and in-edit lists provide caseworkers with a consistent user experience for managing evidence across the system.
- Evidence can exist in both an in-edit and active state and remains in-edit until it is activated. Evidence for which one or more mandatory verifications have been configured cannot be activated until outstanding verifications are satisfied.
- Context panel provides the ability to view:

- **Items to verify**

When caseworkers select the Items to Verify link, the Outstanding in-line tab on the verifications page opens.

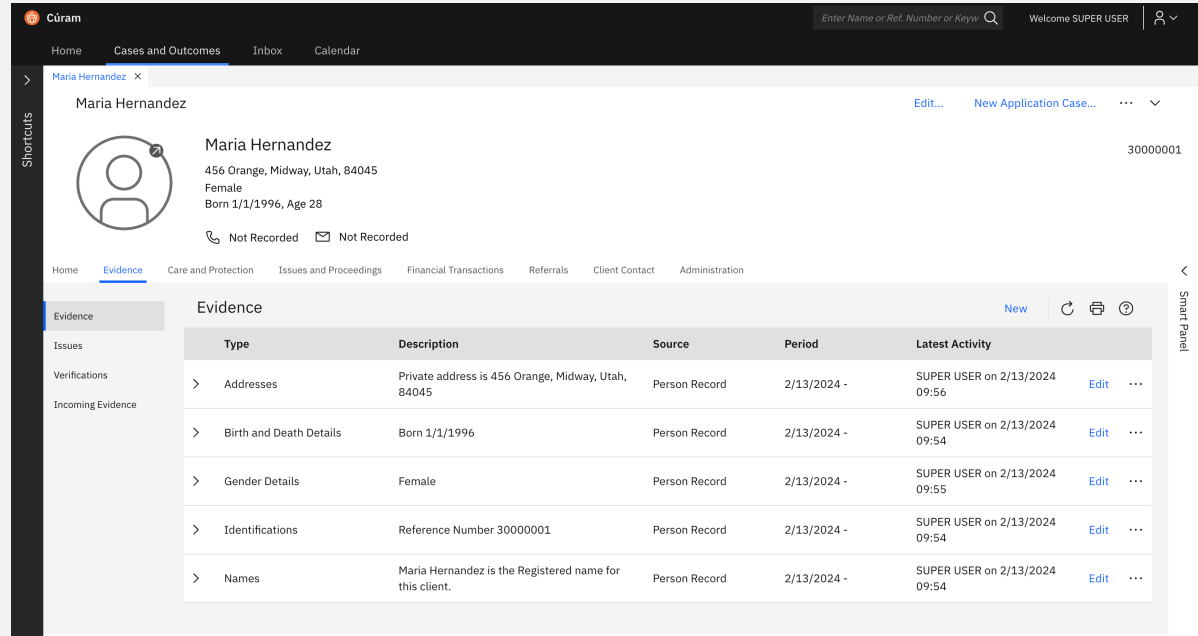
- **In-edit evidence records**

When caseworkers select the Evidence in Edit link, the In Edit Evidence list page opens.



# Maintaining Person Evidence at Integrated Case level

- Customers opting **not** to use Person Evidence Management may continue to use an integrated case to maintain person evidence and share these changes to person level where it is stored on a participant data case.
- No updates are required within the administration application as, by default, the property for Person Evidence Management is not enabled.
- Evidence at the person level remains as is i.e. with an active evidence list page.
- Synchronization is not applicable since it is only by enabling Person Evidence Management that synchronization between person evidence case and participant data case is required.



The screenshot shows the Cúram application interface. The top navigation bar includes 'Home', 'Cases and Outcomes', 'Inbox', and 'Calendar'. The user is logged in as 'SUPER USER'. The main content area is titled 'Maria Hernandez' and displays a profile card with the following information:

- Name: Maria Hernandez
- Address: 456 Orange, Midway, Utah, 84045
- Gender: Female
- Birth Date: Born 1/1/1996, Age 28
- Contact: Not Recorded (Phone and Email)

Below the profile card, there is a navigation menu with 'Evidence' selected. The 'Evidence' section displays a table of records:

Type	Description	Source	Period	Latest Activity
> Addresses	Private address is 456 Orange, Midway, Utah, 84045	Person Record	2/13/2024 -	SUPER USER on 2/13/2024 09:56 <a href="#">Edit</a> ...
> Birth and Death Details	Born 1/1/1996	Person Record	2/13/2024 -	SUPER USER on 2/13/2024 09:54 <a href="#">Edit</a> ...
> Gender Details	Female	Person Record	2/13/2024 -	SUPER USER on 2/13/2024 09:55 <a href="#">Edit</a> ...
> Identifications	Reference Number 30000001	Person Record	2/13/2024 -	SUPER USER on 2/13/2024 09:54 <a href="#">Edit</a> ...
> Names	Maria Hernandez is the Registered name for this client.	Person Record	2/13/2024 -	SUPER USER on 2/13/2024 09:54 <a href="#">Edit</a> ...

# Upgrade Considerations

- When enabling Person Evidence Management, two main areas must be addressed:
  1. Configuration specific to participant data case must be updated to reference person evidence case.
    - Participant verification configurations to be removed from participant data case and re-applied to person evidence case.
    - Participant data case evidence sharing configurations to be removed and recreated against person evidence case.
  2. Data tied to participant data case must be migrated to person evidence case.
    - The PEC Migration Batch process is provided to facilitate the migration of data from participant data case to person evidence case. This manages data migration from a default product standpoint and acts as a foundation that customers can build upon based on their specific customizations.
- **Customers are responsible for their own rulesets** and therefore will need to make the changes required given that common person evidence is no longer on an integrated case and instead on a person evidence case.

## Where to Find More Information

- Merative Social Program Management Documentation 8.1.1
  - What's New in Cúram 8.1.1
  - Person Evidence Management Guide
  - Cúram Upgrade Guide (Section 10.30 PEC Migration Batch)

Thank you

# Forward Looking Statement

Merative's statements regarding its plans, directions and intent are subject to change or withdrawal without notice at Merative's sole discretion.

Information regarding potential future products is intended to outline our general product direction and it should not be relied on in making a purchasing decision.

The information mentioned regarding potential future products is not a commitment, promise, or legal obligation to deliver any material, code or functionality. Information about potential future products may not be incorporated into any contract. The development, release, and timing of any future features or functionality described for our products remains at our sole discretion.



© Merative 2024. All Rights Reserved.

The information contained in this publication is provided for informational purposes only. While efforts were made to verify the completeness and accuracy of the information contained in this publication, it is provided AS IS without warranty of any kind, express or implied. In addition, this information is based on Merative's current product plans and strategy, which are subject to change by Merative without notice. Merative shall not be responsible for any damages arising out of the use of, or otherwise related to, this publication or any other materials. Nothing contained in this publication is intended to, nor shall have the effect of, creating any warranties or representations from Merative or its suppliers or licensors, or altering the terms and conditions of the applicable license agreement governing the use of Merative products.

Product release dates, availability and/or capabilities referenced in this presentation may change at any time at Merative's sole discretion, and are not intended to be a commitment to future product or feature availability in any way. Not all Merative products are available in all jurisdictions in which Merative operates. Nothing contained in these materials is intended to, nor shall have the effect of, stating or implying that any activities undertaken by you will result in any specific performance results, and an individual user may achieve results different than any stated here.

Any customer examples described are presented as illustrations of how those customers have used Merative products and the results they may have achieved. Actual environmental costs and performance characteristics may vary by customer.

Merative, the Merative logo, and merative.com are trademarks of Merative, registered in many jurisdictions worldwide. Other product and service names might be trademarks of Merative or other companies.

