



Cúram 8.1.2

Independent Living Accelerator Guide

Note

Before using this information and the product it supports, read the information in [Notices on page 161](#)

Edition

This edition applies to Cúram 8.1, 8.1.1, and 8.1.2.

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1 Independent Living accelerator

Independent Living is a simple outcome plan that is built on top of the Cúram Platform and Cúram Outcome Management. From a planners initial assessment, a plan is created to assist the client with returning to independent living. The application presents a basic path through Cúram social program and outcome management.

1.1 Overview of Independent Living

The Independent Living accelerator provides a straightforward, worked example of how you can create a basic outcome plan and run a simple assessment. After you worked through the accelerator, you will be familiar with the design decisions and tasks needed to analyze and configure your own solutions based on outcome management.

The Independent Living business scenario

The goal for the Independent Living scenario is to help elderly and vulnerable people to remain in their homes and to remain independent as long as possible.

A typical Independent Living scenario could address the needs of a pensioner like Tony Smith, who is aged 77. Tony is in receipt of an army pension and is able to take care of the weekly shopping and financial affairs. Tony underwent surgery recently and is recovering at home. Due to prolonged periods of bed rest, Tony is suffering from bed sores. The added immobility affects Tony's ability to do weekly shopping, and safety concerns were expressed as Tony lives alone. Based on a needs assessment, extra services are identified which would allow Tony live an independent life.

Independent Living example requirements

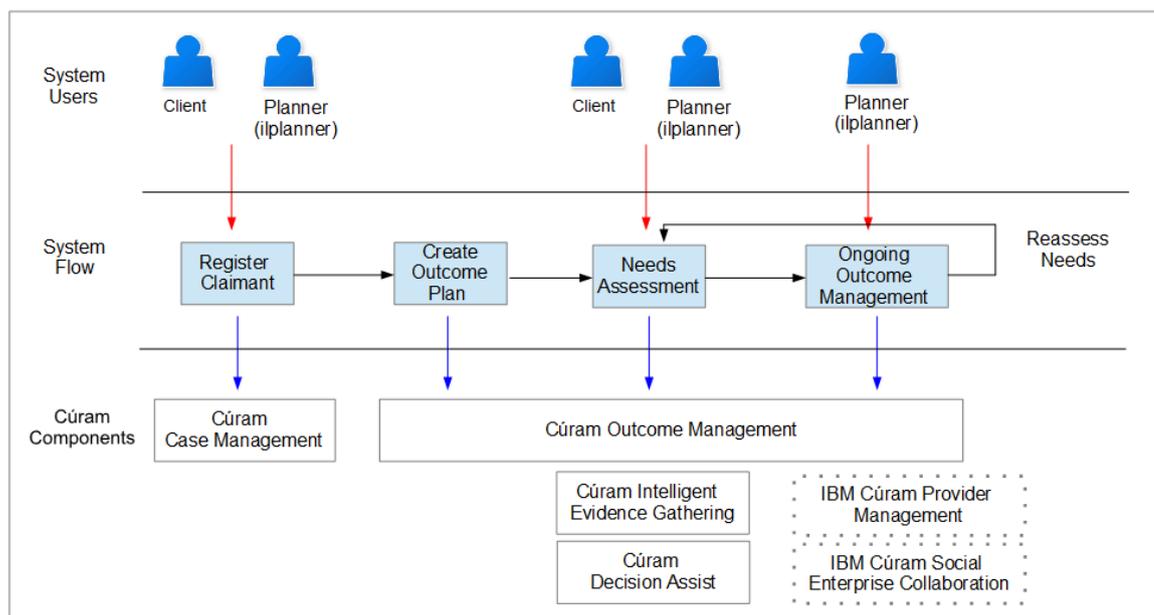
In the worked example, the team that is deploying Independent Living have the following caseworker requirements. The example is designed to familiarize you with the design decisions and tasks that are required to meet these requirements.

- Search for existing clients or register new clients in the system.
- Create an outcome plan for a client.
- Run a needs assessment for the client to determine the initial needs of the client.
- Recommend activities for an outcome plan.
- Reassess a client's needs after a change of circumstance.
- Update the outcome plan with new recommended activities based on the reassessment results.

The Independent Living business process

When a client is referred to an organization, a planner adds them to the system. The planner works with the client to gather and submit the client information. The client information is

assessed against a set of business rules to determine their needs. The planner creates a plan to help the client return to independent living.



Cúram Platform and Cúram Outcome Management provides the processing and components necessary to enable this business process. The business process uses the following components to satisfy the requirements:

- Cúram Case Management**
This platform component helps to manage plans for high-risk, high-need people and intervene with a social program, which results in better outcomes for the individual, in this case a financial payment.
- Cúram Outcome Management**
This separately purchased application module is designed to help organizations assess needs, establish goals, plan for goal attainment, and track progress for citizens and their families by creating and managing outcome plans.
- Cúram Intelligent Evidence Gathering**
This platform component provides an interactive questionnaire to dynamically guide the client or caseworker through the process of information gathering.
- Cúram Decision Assist**
This platform component supports the configuration of an assessment to produce results that lead to activity recommendations for use in an outcome plan. CDA is suitable for simple assessments.
- Cúram Provider Management**
This separately purchased application module enables you to configure services and referrals for a client. The simple plan in the Independent Living accelerator does not include the configurations for integrating with Cúram Provider Management.

- **Cúram Social Enterprise Collaboration**

This separately purchased application module enables you to configure a multidisciplinary team to address the needs of a client. The simple plan in the Independent Living accelerator does not include the configurations for creating a multidisciplinary team with Social Enterprise Configuration.

Independent Living design decisions

To meet the Independent Living requirements, the team must make key design decisions in the following product areas. The design decisions are documented in detail in the Analyzing the Independent Living application section.

- Needs assessment
- Outcome plan
- User application views

1.2 Installing the Independent Living accelerator

The Independent Living accelerator is available for download only to members of Merative, such as Lab Services developers who are assigned to work on a Cúram project on a customer site. However, you can reproduce the sample application on the default product by following the detailed step-by-step instructions in Configuring the Independent Living Application. Complete the following steps to install the Independent Living accelerator.

Before you begin

Install a Cúram Development Environment for application development. You must install the Cúram Data Extractor and the Cúram Outcome Management application module.

Procedure

1. Extract the Independent Living accelerator at the root of the `%CURAM_DIR%` directory.
`%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.
2. From the `%CURAM_DIR%` directory, update the `SetEnvironment.bat` and `SetEnvironment.sh` files.
3. Edit the `SERVER_COMPONENT_ORDER` to add the `IndependentLiving` component after the custom component.
4. Edit the `CLIENT_COMPONENT_ORDER` to add the `IndependentLiving` component after the custom component.
5. From the `%CURAM_DIR%\EJBServer\project\config\deployment_packaging.xml` file to update the Cúram EAR components element to add the `IndependentLiving` component after the custom component.

- From your Cúram server development installation directory `%CURAM_DIR%\EJBServer`, run the following commands.

```
build clean server database
```

```
build createClasspaths
```

- From your Cúram web client development installation directory `%CURAM_DIR%\webclient`, run the following command.

```
build clean client
```

- Refresh the workspace within the Cúram Application Development Environment (ADE) and start the application as normal.

1.3 Performing the Independent Living scenario

Detailed steps are provided for you to walk through the sample application, and experience the full end-to-end business work flow.

Adding a person

Add a person by searching for an existing person or registering a person. If the person does not exist, you can register the person.

Searching for an existing person

Complete the following steps to find a client who is already registered as a person on the system.

Procedure

- Log in to the application with the ilplanner user credentials.
- From **Quick Links**, select the **Search for a Person** link.
- Enter the following values on the **Person Search** tab and select **Search**.

Name	Description
First Name	Given name as stated on official document.
Last Name	Surname as stated on official document.

- From the **Search Results** window, select the **Person** link for any returned results to open the Person's home page.

Registering a person

Add a person by registering a new person.

Procedure

- Log in to the application with the ilplanner user credentials.
- From **Quick Links**, select **Register a Person** link and click **Next**.
- Enter the following mandatory details and click **Save**. A tab opens for the newly registered person.

Name	Description
First Name	Given name as stated on birth certificate.
Last Name	Surname as stated on birth certificate.
Gender	The classification of the Person as either Male or Female.
Date of Birth	An identification date to record the date, month, and year of birth.
Registration Date	The date on which the Person was registered.
Marital Status	The code to denote the state of marriage of the Person.
Nationality	The code to denote the nationality of the Person.
Country/Region of Birth	The country/place of birth of the Person.
Address	By default Cúram supports 3 address layout types <ul style="list-style-type: none"> • US address format. • UK address format. • Free form address format.

Creating an outcome plan

Create an outcome plan for a client.

Procedure

1. From the person home page, select the **Outcome Plan** tab and click **New**.
2. Select the **Type** and enter the **Name** of the outcome plan.
3. Choose the **Start Date** and **Expected End Date**.
4. Drag one or more clients onto the client list to add them to the outcome plan and click **Save**.
The outcome plan opens in a new tab.

Running an assessment for the client

Run the Needs Assessment and answer the questions to determine the initial needs of the client.

Procedure

1. From the outcome plan, select the **Assessments and Factors** tab and click **New**.
2. From the **New Assessment** window, select **Needs Assessment** and click **Next**.
3. From the **Health and Safety** window, provide the following answers to the questions that are asked and click **Next**.

Question	Answer
Is the home clean and tidy?	Yes
Does the client suffer from pressure sores?	Yes
Is the client able to manage their own financial affairs?	Yes
Does the client's lifestyle place them or others at risk?	Yes
Does the client display dangerous behavior towards others?	No

4. From the **Daily Routine** window, provide the following answers to the questions that are asked and click **Next**.

Question	Answer
Can the client wash themselves?	Yes
Can the client feed themselves?	Yes
Can the client obtain food, medicines, and household items?	No
Can the client access the toilet without assistance?	Yes
Can the client walk long distances without assistance?	Yes

- From the **Summary** page, review the answers.
If required, you can use the back button to make changes.
- Click **Next**
The assessment results are displayed.
- Click **Complete** to save the assessment.

Adding activities to the plan

You can add recommended activities that were generated from the Needs Assessment to the plan.

Procedure

- From the outcome plan, select the **Workspace** tab.
- Expand the results tree to see individual factors.
- Expand individual factors to see the recommendations.
- From the **Workspace** tab, drag each activity from the planned recommendations onto the plan.
- From the **New Action** wizard, add the schedule and duration of each action according to the following table.

Factor	Recommendation	Frequency	Duration
Health and Safety	Nursing Services	Daily	2 hours
Daily Routine	Shopping	Weekly on a Friday	1 hour
Health and Safety	Advise on Secure Care	31st of the Month	1 hour

Reassessing the client

Reassessing a needs assessment for a client.

Procedure

- From the outcome plan, select the **Assessments and Factors** tab.
- From the Needs Assessment action menu, select **Reassess**.
- From the **Health and Safety** window, answers the questions as follows and click **Next**.

Question	Answer
Is the home clean and tidy?	Yes
Does the client suffer from pressure sores?	Yes
Is the client able to manage their own financial affairs?	No

Question	Answer
Does the client's lifestyle place them or others at risk?	Yes
Does the client display dangerous behavior towards others?	No

4. From the **Daily Routine** window, answers the questions as follows and click **Next**.

Question	Answer
Can the client wash themselves?	Yes
Can the client feed themselves?	Yes
Can the client obtain food, medicines, and household items?	No
Can the client access the toilet without assistance?	Yes
Can the client dress and undress themselves?	Yes

5. From the **Summary** page, review the answers and click **Next**.
6. Click **Next**
The assessment results are displayed.
7. Click **Complete** to save the assessment.

Updating the plan

Based on the reassessment, add new recommended activities to the plan.

Procedure

1. From the outcome plan, select the **Workspace** tab.
2. From the **Recommendations** window, select the **Factors** tab.
3. Expand to see the individual factors.
4. Expand factors to see individual recommendations.
5. Drag each of the recommended activities onto the plan.
6. From the **New Action** wizard, add the schedule and duration of each action according to the following table.

Factor	Recommendation	Frequency	Duration
Health and Safety	Budgeting	Weekly on a Friday	1 hour
Health and Safety	Nursing Services	Daily	1 hour
Daily Routine	Shopping	Weekly on a Friday	1 hour
Health and Safety	Advise on Secure Care	31st of the Month	1 hour

1.4 Analyzing the Independent Living application

You are guided through the definition of project requirements for each of the main functional areas in the business and technical flow of the sample application. The analysis tasks help you to understand the key design decisions that you must make for each functional area, with important concepts and default configuration options explained.

About this task

Specific examples are provided from the perspective of a business analyst who is defining the requirements for the sample application. Examples can be chosen to demonstrate a particular point, and are not intended to suggest a project methodology. Always read the examples and guidance in the context of your project methodology, any incidental references to project methodology are not proscriptive.

Analyzing the assessment requirements

For each assessment that you plan to use, you must analyze the assessment and identify the project-specific business requirements.

About this task

You must study the assessment and have an understanding of the assessment objective and how it is used to identify the root cause of a client's issues and needs. You must understand the questions on the script and who is being assessed. You must also know how often the assessment is run. You must know the expected results and how they must be displayed. You need to understand these areas before you start with the requirements analysis.

Define the assessment questionnaire requirements

Typically, best practice assessments consist of a pre-defined set of questions with no flexibility in relation to how the questions are worded. You must decide how best to structure the questionnaire for your project.

You must decide on the sequence of the questions on the script and the responses to the questions. The decision on how to represent the answers is based on whether you are allowed to select one answer or multiple answers.

You must decide whether the assessment is used to assess a group of clients as a whole or whether an assessment result is displayed for each individual that is assessed.

For large assessments, you need to consider how to separate the questions into meaningful sections that fit on a page.

Assessment questionnaire

An assessment questionnaire is an interactive Intelligent Evidence Gathering (IEG) question script that is specific to an assessment type.

Caseworkers can gather information about a client by stepping through the interactive script.

The question script specifies the behavior of the questionnaire, such as sequence of the questions, or whether the questions are asked of all clients or a subset of clients. For example, a Caregiver Strength and Needs Assessment presents questions to the primary and secondary caregivers, but not to the focus child.

In the question script, you can specify help text for the entire assessment, a group of questions or for individual questions.

Analyze the assessment factor requirements

You must define the factors across which clients or groups of clients are assessed when a particular type of assessment is run.

Factors

A factor is an aspect of a client circumstance that is of interest to an organization. Client needs are assessed by using factors.

Typically, a factor is considered either a need or a barrier:

- Needs are things that a client or family requires to be self-sustaining, but currently lack.
- Barriers are conditions that prevent or complicate a client's ability to obtain or achieve something. Examples of assessment factors include substance abuse, mental health, and parenting skills.

Each assessment typically has one or more factors, which describe performance standards for that assessment. Each assessment has unique characteristics and while some factors might look similar between assessments, the details of factors such as classifications, and thresholds, might differ across assessments.

A factor can be added to an outcome plan as a result of an assessment. By running a Strengths and Needs assessment, factors such as Substance Abuse and Mental Health can be added to the outcome plan. A factor can also be added to an outcome plan by a caseworker who can select a factor from a pre-defined list of appropriate factors. For example, this option can be used if a third party is running the assessment and the caseworker wants to record the results manually on the outcome plan. Finally, a factor can be added to an outcome plan when defined by a user to specially address a particular circumstance. For example, through meetings between the caseworker and the client an environmental issue might be identified as a factor. The caseworker can record this factor on the outcome plan.

Guidance text can be defined for factors to help the user understand the steps that can be taken to address a particular issue. For example, the following guidance can be displayed if a client is assessed for Substance Abuse and is classified as 'Need': 'The client can use alcohol or prescribed drugs; however, use does not negatively affect their ability to look after themselves. Minimum support is required; perhaps ensure that the client has support from family and friends, the community, or both.'

Categorize and classify assessment factors

After the assessment factors that are applicable to an assessment are defined, they are categorized. Classifications must also be specified for each category.

Factors can be categorized to distinguish between the types of issues that a client needs to deal with. For example, Substance Abuse and Domestic Violence might be categorized as a 'barrier' to achieving a positive outcome whereas Education, Housing and Shelter might be categorized as a 'need'.

Factors must be categorized in the assessment administration application such that a set of results can be derived for a particular factor.

When a client is assessed for a factor, a set of results are produced. The results describe acceptable performance standards or range of results for that assessment. These results are defined by using classifications in the administration application, for example, a client that is assessed for the shelter factor might achieve one of the following results: In crisis, at risk, stable, or self-sufficient. One or more classifications must be associated with a category so that an assessment result can be produced.

Categorizing factors differently allow factors to be classified in different ways. For example, a client who is assessed for the Housing factor, which is categorized as a need, might be classified as safe, progressing, engaged, and vulnerable. However, a client who is assessed for the Substance Abuse factor, which is categorized as a barrier, might be classified as a strength or need.

A score can also form part of an assessment result. For example, substance abuse (categorized as a barrier) can be classified as need (-5 to -1) and strength (0 - 3). Mental health (categorized as a barrier) can be classified as need (-4 to -1) and strength (0 - 2). That is, different ranges of scores can be applied to each classification of a factor. Figure 1 shows an example of the structure of an assessment and the categorization and classifications of factors within that assessment.

You must specify ranges only for the classifications that are associated with the category and are applicable to a factor. If you do not specify ranges for a classification, then it is not displayed in the assessment results.

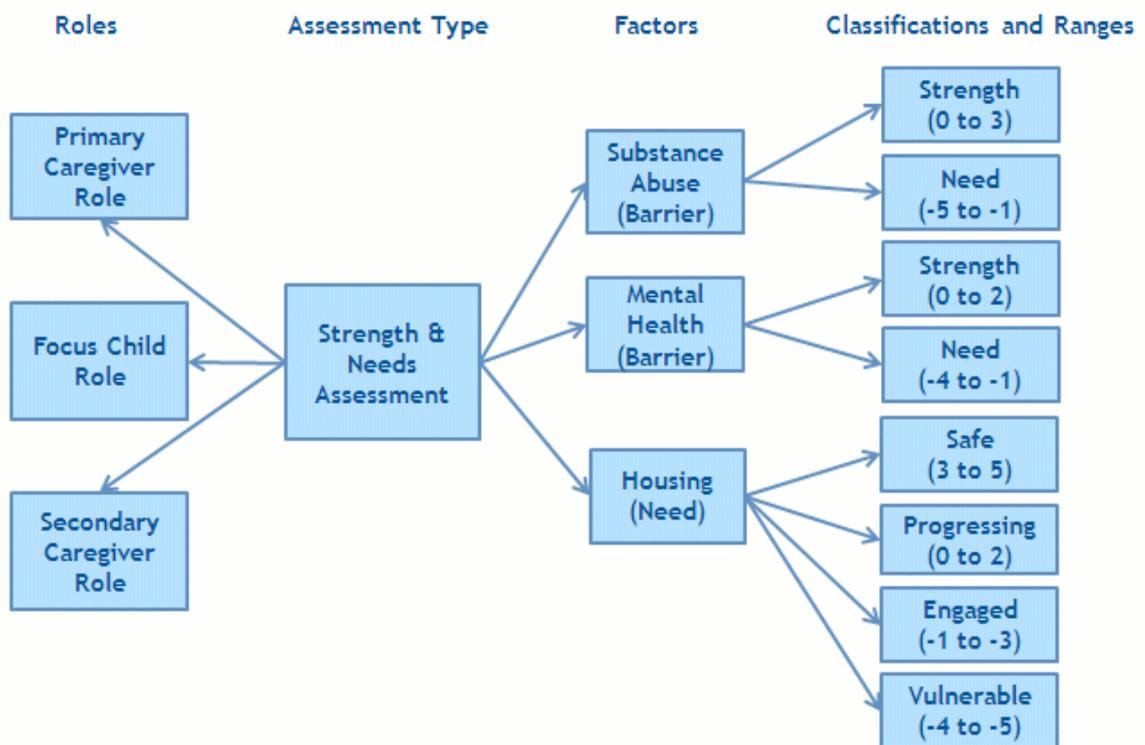


Figure 1: Assessment with Multiple Categories and Classifications

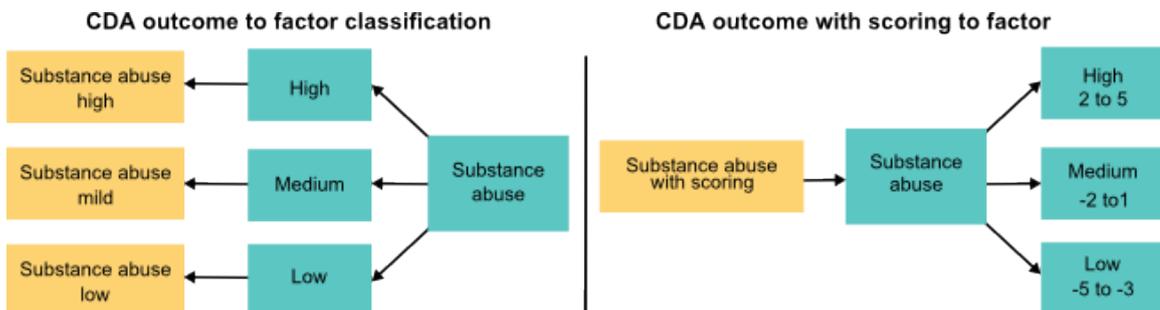
Mapping outcomes to factors

Outcomes are only applicable for assessments, which are implemented by using CDA. If you use the CDA matrix to determine the results, then you must map CDA outcomes to factors or factor classifications. The decision on whether to map to factors or factor classification depends on whether scoring is used in the assessment. If scoring is used, then the CDA Outcomes must be mapped to the assessment factors. If the assessment matrix does not use scores, then the CDA Outcomes must be mapped to the assessment factor classifications.

The outcomes can be mapped to either the factors or the factor classifications.

If you are using scoring, you must map the CDA outcome to the factor. The scoring range is used to map the score to the appropriate classification. For example, a Substance Abuse factor might have three factor scores of High (2-5), Medium (-2 to 1), and Low (-5 to -3). The CDA outcome is Substance Abuse with scoring and it is mapped to the Substance Abuse factor.

If you are not using scoring, CDA outcomes can be mapped directly to factor classifications. For example, a Substance Abuse factor might have three classifications of High, Medium, and Low. So, the three CDA outcomes (Substance Abuse High, Substance Abuse Mild, and Substance Abuse Low) are mapped to the factor classifications (High, Medium, and Low).



Note: Assessments that use a CER rule set to derive the results do not use outcomes. CER rule sets can be created to produce scoring, classifications, or both, so outcomes do not need to be defined.

Define the assessment factor requirements

The requirements for configuring factors can be complex, depending on the size of the assessment. You must consider this guidance when you define the factor requirements.

You must define one or more factors for the assessment. The factors are unique to each assessment.

Once the assessment factors that are applicable to an assessment are defined, they must be categorized. You must define one category for an assessment factor, for example, for a Substance Abuse factor the category might be barrier. A standard assessment has one category.

You must define the classifications for each category. All classifications that are defined for that category are applicable to the factor. The range of results is used to measure a client or group's functioning in that factor. Typically, all factors in an assessment use the same category.

If the assessment has a scoring component, then you must define the classification score. For example, a Self-Sufficiency assessment might score the classifications as Vulnerable (0-2), Engaged (3-5), Progressing (6-8), and Self-Sufficient (9-10).

If you use the CDA matrix to determine the results, then you must map the CDA outcomes to the assessment factors. The outcomes can be mapped to either the factor or the factor classifications. If scoring is used, you must map the CDA outcome to the factor as the range is used to map the score to the appropriate classification. If scoring is not used, CDA outcomes can be mapped directly to factor classifications.

You must decide whether the factor is involved in outcome planning or is only required for the assessment in that they are used to determine the results of an assessment. If the factor is involved in planning, it needs to be marked so that it is available outside of the assessment.

Decide on the assessment role requirements

You use assessment roles to target questions at clients that play those roles. You must decide how many separate roles you require to meet your assessment requirements.

Assessment roles

An assessment role represents the part that a client plays in terms of an assessment. For example, an assessment might be assessing a client in their role as Primary Caregiver or as a Secondary Caregiver.

Decide whether the assessment is role-based or group-based

You must decide whether the assessment is role-based or group-based. The decision is primarily based on the wording of the assessment questionnaire.

You must study the assessment questionnaire to determine whether the assessment questions are applicable to each role on the assessment or to specific roles only. If the assessment is group-based, then you must name the group, for example, household or family.

You must also decide how the assessment results are displayed. You must decide whether the results need to be displayed for both a group of clients and for individual clients.

Group and role-based assessments

The questions asked on the assessment can be directed to a specific group of clients or to the roles that are defined for the assessment definition.

For group-based assessments, the questions asked during the assessment are specific to a group of clients, such as a household. For example, if there are 5 members in the household the questions are asked one time of the entire household.

For role-based assessment, the questions that are asked are specific to the roles defined for the assessment. An example of a role-based assessment is the Caregiver Strength and Needs Assessment with roles of primary caregiver, secondary caregiver, and focus child. The questions are only asked of the roles that are selected when you run the assessment.

Define the assessment behavior

You must define how the assessment is managed and the results are displayed.

You must decide whether it is required to escalate the most urgent assessment results to the caseworker. You can select each factor that is considered a priority. For example, a caseworker might prioritize the factors for which the client scored the lowest results.

You must decide whether reassessment is appropriate for the assessment. Reassessment allows a client's progress for specific factors to be measured over time.

You must decide whether it is necessary to display guidance or help text on the assessment results or home page. The guidance assists a caseworker in addressing needs identified during the assessment of factors. For example, guidance can be provided which suggests that a caseworker

can address a factor by creating particular services for clients. If you choose to display guidance, you must document the text that must be displayed for specific factor classifications, factor classification sub divisions, or both.

You must decide how to display the assessment results for each client. There are two options for displaying the results on the assessment results page and the assessment home page - a graph or a list. Selecting to graph or to list the assessment results depends on the assessment itself. For example, you must consider listing the results of a single factor assessment. Additionally, if reassessment is not applicable to an assessment, it might be more appropriate to list the results. If an assessment has multiple factors that use the same classification and scoring ranges or if reassessment is applicable, you must consider displaying the results on a graph. Use graphed results to track a history of the client or family's progress over time.

Decide on the assessment engine to determine assessment results

You must decide which assessment engine to use to determine the assessment results. Only one assessment engine can be used. This decision is based on the complexity of the assessment and whether there is a single outcome or multiple outcomes.

Simple assessments

Cúram Decision Assist is suitable for simple assessments.

A simple assessment does not require rules processing. Typically, it has a single outcome, but can have multiple outcomes.

Cúram Decision Assist can be used for assessments where results can be derived without rules processing. For example, a Caregiver Strength and Needs assessment contains nine factors. Each factor has one question with four possible answers. The assessment result for each factor is derived from the answer that is provided by a user.

Cúram Decision Assist

Cúram Decision Assist (CDA) is a tool that allows organizations to dynamically configure and run simple assessments. Using CDA, you can link an existing Intelligent Evidence Gathering (IEG) questionnaire with a decision matrix to run rules and determine the assessment outcomes. CDA is also used to track assessment outcomes over time and to see the reasons for any changes.

For the selected questionnaire, you can choose which questions are used by the decision matrix. The answers to the questions are used by the decision matrix to determine outcomes. You can choose to score the answers. The score is then used to determine the outcome. CDA compares the evidence that is collected against what is configured to arrive at an outcome without using calculations.

The decision matrix can be thought of as a table. Each row in the table represents a question; each sub row represents an answer; each column represents a potential outcome; each sub column represents a combination of answers that lead to an outcome. A decision matrix can have a single outcome or multiple outcomes and a rating based on a scoring mechanism for each answer.

For example, you might have a Mental Health Assessment with a question about depression. Using CDA, you can choose to include the depression question in the decision matrix. The question has two possible answers of 'Most Days' and 'Some Days'. These answers are pulled from the questionnaire and included in the decision matrix. Using the decision matrix, you can score the responses. You might score 'Most Days' as a 1 and 'Some Days' as a 0. You can then specify Depression as an outcome for the answers. The client who responds Most Days is at a higher risk of being depressed.

CDA provides an easy way of answering questionnaires, reviewing the answers, determining results, and comparing the answers and decisions that are made over time. Answers given to questionnaires can be changed and new decisions can be made. CDA provides an easy and efficient way of maintaining rules-based assessments. The assessment lifecycle that is supported by Decision Assist is easy to complete and repeat, if required.

Complex assessments

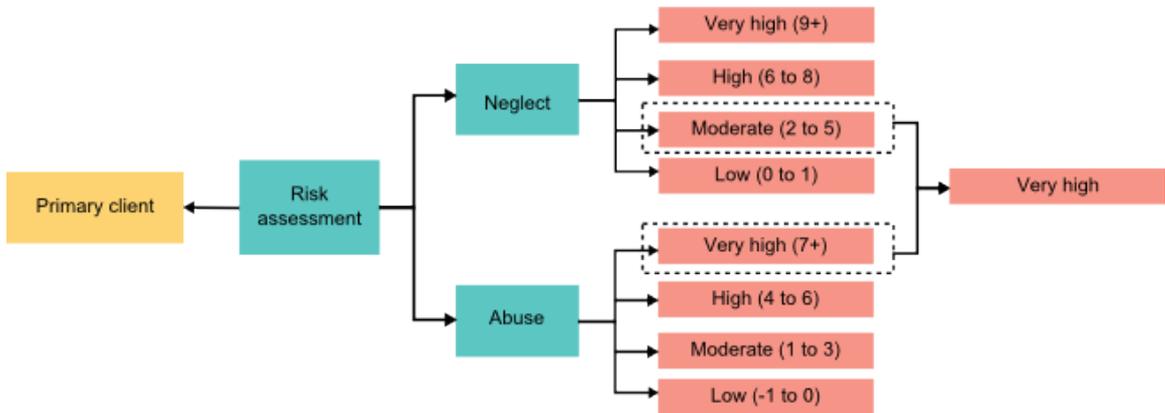
Cúram Express Rules (CER) can be used for more complex assessments where deriving the assessment results requires rules processing. CER is used as the assessment engine along with the Intelligent Evidence Gathering (IEG) tool to determine assessment results.

An assessment is considered complex when the assessment rule sets include calculations and data comparison. A complex assessment typically has multiple outcomes.

You can configure the assessment definition to use an IEG script combined with a CER rule set to derive the assessment results for complex assessment.

For example, CER can be used for a complex risk assessment that has two factors, Neglect and Abuse. Neglect is classified by using classifications of Low (0 - 1), Moderate (2 - 5), High (6 - 8), and Very High (9+). Abuse is classified by using classifications of Low (-1 to 0), Moderate (1 - 3), High (4 - 6), and Very High (7+).

The assessment produces a risk level, which is derived from the highest of the classifications for Neglect and Abuse. For example, if the household that is being assessed is classified as Moderate for Neglect and Very High for abuse, the risk level is Very High. This type of processing requires a CER rule set.



Cúram Express Rules

Curam Express Rules (CER) is a domain-specific language that was developed by Cúram for use in defining questions that can be asked within the Cúram application, and for performing calculations. CER is used for a number of different aspects of Cúram configuration.

CER rule sets are stored as XML data on the application database. The XML data for a CER rule set adheres to the CER rule schema. CER rule sets can be created and maintained in the CER Editor.

Each question specifies the following information:

- Name
- The type of data that provides the answer to the question.
- The rules for providing the answer.

Answers to questions can be as yes or no, or you can define answer types to be as complex as you need. For example, answering the question "Which groups of people in the household have an urgent need?" might need a list of household groups, with each household group containing a list of people.

Rules for determining the answer to questions can be as simple or as complex as you need. For example, the rule for the answer to the question "What is the claimant's date of birth?" is likely to (trivially) be "the date that the claimant declared their date of birth to be", whereas the rule for answering the question "Is this person eligible to receive a benefit?" is likely to involve further questions such as "What level of income does this person have?" or "How many children does this person have?".

CER rule sets are stored as XML data on the application database. The XML data for a CER rule set adheres to the CER rule schema. CER rule sets can be created and maintained in the CER Editor.

CER can store rule objects on the database, so that the rule objects are available for future processing. CER can integrate with the Dependency Manager to detect when input data changed, and to automatically update calculation results, which depend on these input data items, similar to spreadsheet processing.

Analyzing the outcome plan requirements

You must analyze and define the outcome plan requirements.

Define the required outcome

You must define the required outcome and then decide on the outcome plan name, goals, and objectives.

Goals

An outcome plan is used to help one or more clients achieve their goals. The goal is the primary objective that a client is working towards to become independent of the agency.

An outcome plan can support plan goals, client goals, or both. For example, an Assisted Living plan can be created to achieve the goal of remaining in the home.

Objectives

Objectives are smaller steps that can be undertaken by a client to achieve the outcome plan goal. You must decide whether your plan requires objectives.

An objective can be optionally specified for one or more clients on an outcome plan. For example, the objectives for a client on an Assisted Living outcome plan might be to 'Manage Disease' or 'Independent Living'.

Define the required factors

A factor is an aspect of a client circumstance that is of interest to an organization. You must analyze your project requirements to determine which factors can be associated with the outcome plan and how they can be implemented.

You must decide whether it is necessary to record results for a factor outside of running an assessment. For example, a client might take their General Education Development (GED) test at

a third-party agency. The agency sends the test results to the caseworker. The caseworker creates a factor for the GED test in the system and records the test results.

You must decide whether a user is allowed to add factors that are not pre-configured on an outcome plan to address a particular circumstance.

Priority factors represent the factors where either the most serious or pressing issues lie, or where the most can be gained by applying resources to the problems or even strengths. You must decide whether a caseworker can choose to prioritize factors within an outcome plan.

You must determine whether guidance text is available from the agency for inclusion in the outcome plan to assist the caseworker in dealing with issues.

Factors

A factor is an aspect of a client circumstance that is of interest to an organization. Client needs are assessed by using factors.

Typically, a factor is considered either a need or a barrier:

- Needs are things that a client or family requires to be self-sustaining, but currently lack.
- Barriers are conditions that prevent or complicate a client's ability to obtain or achieve something. Examples of assessment factors include substance abuse, mental health, and parenting skills.

Each assessment typically has one or more factors, which describe performance standards for that assessment. Each assessment has unique characteristics and while some factors might look similar between assessments, the details of factors such as classifications, and thresholds, might differ across assessments.

A factor can be added to an outcome plan as a result of an assessment. By running a Strengths and Needs assessment, factors such as Substance Abuse and Mental Health can be added to the outcome plan. A factor can also be added to an outcome plan by a caseworker who can select a factor from a pre-defined list of appropriate factors. For example, this option can be used if a third party is running the assessment and the caseworker wants to record the results manually on the outcome plan. Finally, a factor can be added to an outcome plan when defined by a user to specially address a particular circumstance. For example, through meetings between the caseworker and the client an environmental issue might be identified as a factor. The caseworker can record this factor on the outcome plan.

Guidance text can be defined for factors to help the user understand the steps that can be taken to address a particular issue. For example, the following guidance can be displayed if a client is assessed for Substance Abuse and is classified as 'Need': 'The client can use alcohol or prescribed drugs; however, use does not negatively affect their ability to look after themselves. Minimum support is required; perhaps ensure that the client has support from family and friends, the community, or both.'

Analyze the outcome plan activity requirements

You must decide what activities you need to help a client achieve their goals. Activities might include counseling sessions, physiotherapy, or an exercise routine. Within outcome management, these activities are represented by services, referrals, and actions.

The activity workspace provides a caseworker with the capability to easily manage activities. The caseworker can also quickly schedule new activities. The activity workspace provides a central view on all activities that are currently scheduled for clients.

A caseworker can search for and add an activity to an outcome plan, or they can choose to add an activity that is recommended by the system.

Actions

An action is a type of activity that can be added by a caseworker to a client's outcome plan.

Provider Management activities

If you have the separately licensed Provider Management application module, you can configure more activities.

Services

A service is a type of activity that can be added by a caseworker to a client's outcome plan.

A service is paid for and tracked by the organization, but it is delivered by a third party or agency. Scheduling a service begins with the selection of the service. A caseworker can search for and select a service by using a taxonomy search or a name search, which returns services from the CPM services registry. The service can also be recommended by the system and then selected by a caseworker. The service that is selected dictates the information to be specified. Depending on how the service is defined, the following information can be specified when the caseworker schedules a service: Number of units, authorized rate, frequency, required participation, nominee payment, owner, provider, and provider location.

Referrals

A referral is a type of activity that can be added by a caseworker to a client's outcome plan. The caseworker can refer a client for a service to address a client need.

A referral is provided by a third party and is typically not tracked or paid for by the agency. The process begins with the selection of the referral service. A caseworker can select from a list of referral services that are stored in the CPM services registry, or the referral service can be suggested by the system. The service that is selected dictates the information to be specified. The following information can be specified when the caseworker schedules a referral: referral date, whether to follow up with the client, provider and whether to send notifications to the client and provider.

Define the outcome plan activity requirements

You must define a list of activities that are required to address client needs and decide on the activity types that must be associated with the outcome plan.

You must work together with the project team to identify the actions and services that are the most suitable to achieving positive outcomes.

You must consider the following when you analyze the referral:

- is a follow-up with the client necessary,
- who are the providers, and
- do notifications need to be sent to the client and the provider when a referral service is added to the outcome plan.

Define the recommendation requirements

You must decide what activities can be recommended based on your project requirements.

When the assessment requires recommended activities, you must determine how the recommendations are mapped to the factor classification or score. You must also consider whether the recommendations can be further broken down. You can configure the system so that certain activities are recommended for a specific classification score, or a portion of the range for that score.

You must also decide whether the recommendation is advised or discretionary. If it is advised, then the caseworker must follow the recommendation and add the activity to the plan. If the recommendation is discretionary, then it is up to the caseworker to decide to add the activity to the plan or not.

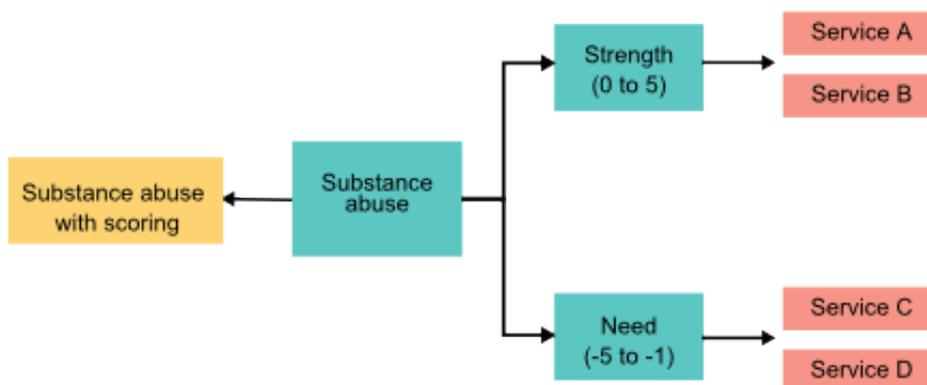
Recommendations

Recommendations are suggestions of activities (services, actions, or referrals) or objectives that are targeted to address a client's specific circumstances. These recommendations are often based on best practices or suggestions from subject matter experts.

Recommendations are displayed in the activity workspace in the outcome plan when clients are assessed and recommendations are configured for the assessment that is run. The recommendation that is displayed depends on the client's circumstances (assessment results).

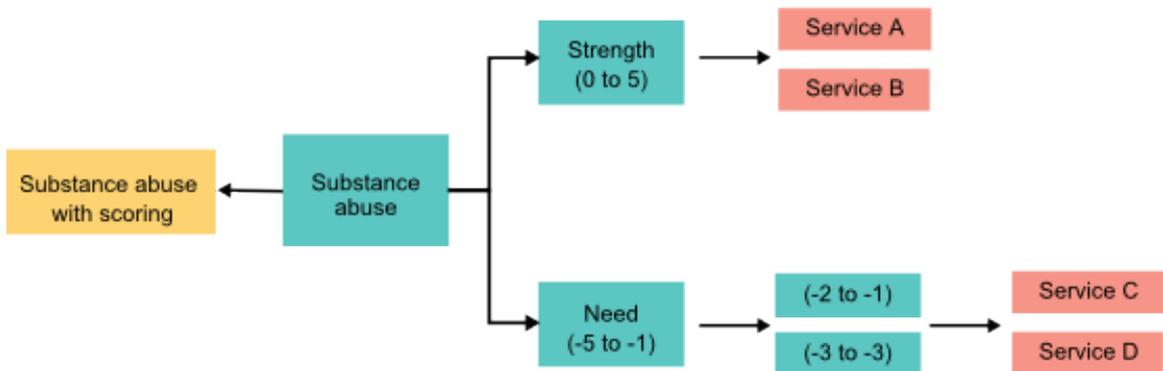
An activity can be recommended in two ways. It can be recommended by the system when that outcome plan is created for a client. It can also be associated with a factor such that the action is recommended when a client achieves a particular result from being assessed.

For example, you can configure that a counseling service (Service C) is recommended if a client scores a classification of 'Need' on the Substance Abuse factor.



Activities can also be recommended at a more granular level, for example a day retreat program (Service D) can be recommended if a client scores a value of -5.

Recommendations can be created for services, referrals, and actions. A recommendation and reason can be specified. A recommendation indicates whether the caseworker is advised to add the recommended activity or objective to the outcome plan for a client, or whether it is discretionary to do so. The reason indicates why you think the recommended activity or objective must be added to the outcome plan.



More recommendations with CPM

If you have the separately licensed CPM, then you can also recommend services and referrals.

Analyze the multidisciplinary team requirements

You must decide whether a multidisciplinary team (MDT) can be assigned to an outcome plan type. If MDTs are applicable, you must decide on the types of MDTs that can be associated with the plan type, and decide on the members of the team.

Multidisciplinary team portal

The multidisciplinary team (MDT) portal provides a forum to teams of skilled individuals and community members where they can share information and communicate effectively with each other. It provides communication tools such as discussion boards and support for scheduling meetings and recording meeting minutes, which enable persons to work collectively to help families.

An MDT can be assigned to an outcome plan to enable collaboration between the caseworker and individuals who represent various disciplines within the team. The MDT members can use the MDT portal to view outcome plans to which they are assigned. An MDT member can view information that is shared with the member. An MDT member can also add an attachment or note. After it is added, the caseworker is informed and can decide to share the items with other members of the MDT.

It is important to note that the MDT portal is a separately licensed tool from Outcome Management that is supported in Social Enterprise Collaboration (SEC). SEC is a common platform and set of tools for multidisciplinary collaboration in social program organizations. Social Enterprise Collaboration enables these multidisciplinary team members to reach beyond their organizational boundaries to collaborate in support of their clients' needs.

Decide whether an MDT is required for an outcome plan

You must decide on the MDT type and what information can be shared with each member.

You must decide whether a team with the same individuals can be assigned to particular types of outcome plans. The other option is to allow the caseworker to add the team on an ad hoc basis.

You must identify who the MDT members are.

You must decide which information can be shared with each MDT. The following information is shareable:

- Services
- Actions
- Referrals
- Notes
- Attachments

Analyze the requirements for monitoring client progress

Outcome management can track a client's progress to assess the effectiveness of their assigned actions, services, and referrals. You must analyze the requirements for monitoring the client progress that includes reassessment, plan reviews, and client participation.

Reassessments

Outcome Management supports the reassessment of a client over time by identifying current needs and displaying a client's progress over time. The caseworker can run a reassessment, compare assessment results, and view a history of the results.

Use reassessment to rerun an assessment on a client or group of clients across all of the factors that were assessed during the original assessment, or across a subset of factors. For example, if the original assessment was run across factors of substance abuse, social support, and domestic violence factors, the caseworker might decide to reassess the client across the substance abuse and domestic violence factors, since the client achieved a sufficient score for the social support factor when the initial assessment was first run.

If escalation of the most urgent results is applicable to the assessment, on running a reassessment, new priority factors can be selected from the reassessment results. For example, if the reassessment results show that a client achieved sufficiency in a factor that was previously marked as a priority when the original assessment was run, the caseworker might decide to concentrate on new priority factors on reassessment. For example, a caseworker might prioritize the factors for which the client scored the lowest results on the reassessment.

If the assessment allows role changes during reassessment, on initiating the reassessment, the caseworker can update the roles that are played by the clients on the assessment if necessary. For example, if James Smith is assigned the role of primary caregiver and Linda Smith is assigned the role of the secondary caregiver when a needs assessment is first run and after the assessment, Linda Smith becomes the Primary Caregiver, the caseworker can change the client who satisfies the role of the primary caregiver for reassessment purposes.

Assessment result comparison is used to compare the results of an initial assessment with any reassessment. The caseworker can also compare the results of any two reassessments that are run on a particular client or group of clients. By comparing assessment results, the caseworker can easily identify what caused a change in a client's progress from one assessment and another. For example, the factors that have different results can be identified along with the questions and answers that led to these differences.

When the results of two assessments are compared, the system displays the classification and the score that is achieved for both assessments per factor and client assessed. For example, for Assessment A, James Smith might have a score of -1 for the Substance Abuse factor that is classified as a Need. For Assessment B, James Smith might have a score of 2, which is classified as a Strength. The client's answers are also displayed for each assessment that is compared. The caseworker can easily identify the differences between each set of assessment results, the differences between the assessment results and the answers are highlighted.

The caseworker can also view the assessment history. The view provides access to the results achieved by clients each time that the clients were assessed. For each assessment, the caseworker

can view the clients that were assessed, the roles that the client played on the assessment, when the assessment was started and completed, and a list or graphical representation of the results. The system displays a clients progress over time for each factor.

Outcome plan reviews

Outcome plan reviews can be carried out to ensure that the activities on an outcome plan are correctly addressing the needs of clients. Reviews also assess the client's progress towards achieving the plan goals and objectives. The caseworker can make appropriate changes to the plan based on the client's current circumstances.

Reviews are normally undertaken at regular intervals. For example, a review can take place every 90 days. The first review, however, can be undertaken shortly after plan creation to ensure that any issues a client is experiencing can be dealt with early in the planning process. You can specify a review frequency that defines when subsequent reviews need to be undertaken. Based on this frequency, the system displays a next review date on the outcome plan to inform the caseworker when the next review is due.

The review process begins when the caseworker creates a review on the system, specifies the type of review, a review period, and an expected completion date. While a review is ongoing, any new or completed activities, goals, or objectives are automatically recorded in the review and can be seen by the caseworker. The expected completion date can later be updated by a caseworker and a history of changes to the expected completion date recorded. A textual narrative of the review can be recorded with review notes.

The system also displays a list of activities and goals that were not reviewed.

The review is complete when the caseworker finishes the review of all necessary aspects of the plan.

Assessments can be run as part of a review. The output of the assessment can provide information to the caseworker to review other items such as goals or objectives.

The effectiveness and appropriateness of visits (or interactions) between visited clients and visitors can be reviewed. A visit review is created for each visited client and visitor where a visitation plan for the participants exists for the review period. To assist the caseworker with their visit evaluations, a list of visits that occurred during the review period, along with the compliance, is displayed for the visit reviews. Compliance measures whether the visitor was compliant with the expectations with regards to the frequency of visits with the visited client in question.

Client participation

Client participation information can be captured in the system to track whether the client is participating in their assigned activities.

To ensure that a client is participating in the services and actions that are assigned to them, a caseworker or provider can record client participation information. If a client is not participating as required, sanctions can be applied to their benefits. A provider can record daily attendance for services that use rosters in CPM. A caseworker can also record daily attendance for actions and services from within an outcome plan.

Progress notes

Progress notes can be used to indicate how well a client is progressing and to capture detailed information about their progress.

Progress notes can be used to capture the client's progress that is related to goals, objectives, services, actions, and factors. When you create a new progress note, you must select a progress

rating and enter a textual description about the client's progress. For example, you might select a progress rating of Excellent, Good, Moderate, or Poor. You can substantiate the rating by adding detailed information about how the client is progressing.

Define the requirements for monitoring client progress

You must define the requirements for monitoring client progress by using reassessment, plan reviews, and progress notes.

For reassessments, you must decide whether an assessment can be reassessed. If so, you must decide whether the assessment can be rerun on a client or group of clients. You must also decide whether role changes are allowed upon reassessment. You must define how often a reassessment must occur.

For plan reviews, you must decide on when the first review can take place. You must also decide on the frequency calculation. The frequency calculation can be based on the Scheduled Date of the Preview Review Completion Date. You must decide on the review frequency that determines when to do subsequent reviews.

For client participation, you must decide whether participation information must be captured for an activity. You must also decide whether sanctions can be applied to the client's benefit.

For progress notes, you must decide on the progress values and the order of how the progress values can be displayed.

Analyzing the user requirements

You must analyze the default application user interface to ensure that it meets your requirements.

User application view

A user application view is a pre-defined view of the application that is specific to a user role. The user application view displays the application home page, personalized pod pages, sections, shortcuts, searches, tabs, and other user interface components that are relevant to the user role.

User interface components

An application user interface is composed of a number of elements that allow a user to perform functions on the system.

For more information about the user interface, see the *Web Client Reference Manual*.

Users

A user is somebody who is employed by the organization to complete tasks on the system, such as creating and managing cases.

New users must be registered on the system and assigned a security role and user application view.

Default user application views

There are a number of default user application views including the administrator and system administrator. From an outcome planning perspective, the most important user application view is the outcome planner view.

Administrator user application view

The administrator user application view provides access to the administration configurations for the administrator user.

The administrator user application view allows the user to configure the organization structure, location structure, case structure, rules, evidence, intelligent evidence gathering, intake, among other functional areas.

System administrator user application view

The system administrator user application view provides access to the system administration configurations for the system administrator user.

The system administrator user application view allows the user to configure application properties. The user can also configure case audit selection queries, communication templates, batch processes, security settings, business intelligence reports, target systems, and content management interoperability services.

Outcome planner user application view

The outcome planner user application view allows the user to identify clients needs, plan activities to address these needs, and monitor a client's progress over time to ensure that these needs are being met.

The user application view sections, pods, tabs, and shortcut panel are configurable.

Define the user application view requirements

As part of any deployment of Cúram, you must identify the functional and data requirements for each of your users. Review the existing user application views and define any additional requirements for your users.

The user role and user application views can be determined by examining functional areas (for example, Outcome Management and On-going Cases) and existing requirement documentation. You must understand which features are required by the user role.

When you define the requirements for the user application view, you must consider the following user application view elements:

- Personalized pod pages,
- Sections,
- Tabs
- Shortcuts, and
- Searches.

You must decide which pods must be pre-configured on the personalized pod pages and which ones can be added at the discretion of the user. You must also consider whether any of the pre-defined pods need to be modified and if there is a requirement for a custom pod.

You need to decide which sections can be displayed for the user role and limit the number of sections to under five sections.

It is also important to review the existing tab structure to determine whether any tabs must be removed if the user role does not require access to the information.

You must also decide whether the default shortcut panel menu items need to be modified. Consider removing any links the user role must not have access to. Conversely, the user role might require more links on the shortcut panel to perform their tasks.

The default application allows the user to perform various searches on the system data. You must decide whether all of the existing search pages that are displayed in the user application view are required by the user role. You might need to modify the search pages if the user role must not have access to some of the data that is presented in the search results.

Analysis results for Independent Living

Analysis of the Independent Living application requirements resulted in the following design decisions.

Independent Living assessments

The Independent Living sample application required a simple assessment for illustrative purposes. A simple needs assessment satisfied the Independent Living outcome plan requirements.

The needs assessment contains limited questions about health and safety and the client's daily routine.

CDA is used to create the assessment questionnaire and determine the assessment results. The CDA outcomes are mapped to factors. The outcomes are scored.

Independent Living outcome plan

The Independent Living sample application required a simple plan for illustrative purposes. The following plan satisfied the Independent Living outcome plan requirements.

The Independent Living plan is created based on the needs that are identified in the needs assessment. The goal of the plan is to empower and enable people to achieve choice and control over their lives and full participation as equal citizens in society.

The system recommends actions to address the client needs identified by the assessment. The Independent Living plan does not recommend services or referrals that are both available through CPM.

To monitor client progress, the outcome plan review is scheduled to take place every 30 days. The caseworker can also capture the client's progress by writing progress notes.

The decision was made not to use multidisciplinary teams.

Independent Living users and user application views

The Independent Living sample application focuses on outcome planning. The addition of a slightly modified version of the Outcome Planner view, in addition to the default administrator and system administrator user application views, satisfied the Independent Living user requirements.

1.5 Configuring the Independent Living application

Detailed step-by-step instructions are provided for you to reproduce the sample application on the default product. Reproducing the sample application gives you practical hands-on

experience with each of the technologies and configuration steps that you need to create your own application.

Before you begin

Attention: Ensure that you always save your configuration files so that your configuration changes are persisted. Configuration files are overwritten each time you run a build database target.

For each generic task, child pages provide you with the specific values that you need to reproduce the sample application.

Configuring the component order for Independent Living

You must add Independent Living to the server and client component orders so that the Independent Living component is included in the Cúram server and client builds.

Before you begin

Install a Cúram Development Environment for application development. The basic Cúram Development Environment consists of the Cúram Application Development Environment (ADE) and Java IDE.

About this task

You need to create a *CustomEnvironment.bat* file for running Cúram from Microsoft Windows or a *CustomEnvironment.sh* file for UNIX. You must not update the *SetEnvironment.bat/sh* files directly to include the additional components. As the *SetEnvironment.bat/sh* files are supplied with Cúram, the files are overridden if you install a new version of Cúram. `%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

Procedure

1. From the `%CURAM_DIR%` directory, create the *CustomEnvironment.bat* and *CustomEnvironment.sh* files.
2. Edit the *CustomEnvironment.bat* file to add the following details to set the component order for Independent Living.

```
set CLIENT_COMPONENT_ORDER=IndependentLiving,%CLIENT_COMPONENT_ORDER%
set SERVER_COMPONENT_ORDER=IndependentLiving,%SERVER_COMPONENT_ORDER%
```

3. Edit the *CustomEnvironment.sh* to add the following details to set the component order for Independent Living.

```
export CLIENT_COMPONENT_ORDER=IndependentLiving,$CLIENT_COMPONENT_ORDER
export SERVER_COMPONENT_ORDER=IndependentLiving,$SERVER_COMPONENT_ORDER
```

4. From the `%CURAM_DIR%` directory, run *SetEnvironment.bat*

Create a user and associated user application view

Create a user and define the user application view. A user application view presents a user with a pre-defined view of the application specific to their user role.

Configuring a user application view

Complete the following administration tasks to configure a user application view.

Creating an application home page

Home pages are pages that are tailored to specific roles within an organization, such as case worker, intake worker, or supervisor. Every application has a home page. The home page can be configured to contain pods, announcements, and quick links. Complete the following administration tasks to configure an application home page.

Procedure

1. Create the application home page.
For example, `<page_name>.uim`.
2. Create a properties file for the associated UIM page to include the help text description.
For example, `<page_name>.properties`.
3. Create a constants file to include the page identifier name.
For example, `Constants.properties`.
4. From your Cúram web client development installation directory `%CURAM_DIR%\webclient`, run **build client**.
`%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.
5. Refresh the workspace within the Cúram Application Development Environment (ADE).

Independent Living application home page files

The following are the configuration files that are used for configuring the assessment planner application home page for Independent Living.

File name	Location
<code>ILAssessmentPlannerHome.uim</code>	<code>%CURAM_DIR%\webclient\components\IndependentLiving</code>
<code>ILAssessmentPlannerHome.properties</code>	<code>\HomePage</code>
<code>Constants.properties</code>	

Note: `%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

Configuring personalized pod pages

You must configure a personalized pod page for each application home page. Personal pages contain multiple pods. The user can alter the content and layout of the personal page by rearranging the pods on the page, by adding more pods or by hiding pods. Complete the following administration tasks to configure personalized pod pages.

Procedure

1. Log in to Cúram as a user with administrator credentials.
2. Select the **Administration Workspace** tab, expand the **Shortcuts** menu, and click **User Interface > Personalized Pods Pages**.

3. Click New Personalized Page**4. From the Configure a Personal Page wizard, complete the following steps.**

- a) From the **Page ID** window, enter the *Page ID* of the UIM to be configured and click **Next**.
- b) From the **User Role** window, select a role to associate with the page and click **Next**.
- c) From the **Available Pods** window, select the **PODs** to be displayed on the page and click **Next**.
- d) From the **Defaults Pods** window, select the **PODs** to be displayed by default and click **Next**.
- e) From the **Page Layout** window, enter the number of columns to be displayed on the page and click **Next**.
- f) Click **Save**.

Pod values for Independent Living

Specify the following values for creating the personalized pods for the Independent Living assessment planner worker.

Name	Value
Page ID	ILAssessmentPlannerHome
User Role	PLANNERROLE
Available Pods	Select the following check boxes: <ul style="list-style-type: none"> • My Next Reviews • My Ongoing Reviews • My Tasks • My Appointments • Quicks Links • Work Queues
Default Pods	Select 'Available Tasks'
Page Layout	3

Configuring a tab

Content in a section is displayed in a tab, and each section can open multiple tabs, where each tab represents a business object or logical grouping of information. A tab can also be described as a logical grouping of pages. Complete the following administration tasks to configure a tab.

Procedure

1. From the **Administration Workspace > User Interface > Tabs**, click **New**.
2. From the **New Tab** window, complete the following fields and click **Save**.

Name	Description
ID	Specify the page name. The tab is displayed when the page is loaded.
Name	The tab name.
Title	The tab title.

Tab values for Independent Living

Specify the following values for creating a tab for the Independent Living assessment planner home page.

Name	Value
ID	ILAssessmentPlannerHome
Name	Home
Title	Home

Configuring a section

An application contains a number of sections, which allow quick and easy access to some of the more common tasks and activities that are completed by a user. A user application view can define between one and five sections. For example, Home, Inbox, Case, Outcomes, and Calendar. Each section supports displaying multiple object tabs. For creating a section, you need to create a home and workspace section. The home and workspace sections are mandatory, and a maximum of five sections is advised.

Procedure

From the **Administration Workspace > User Interface > Sections**, click **New**.

Configuring a home section

Complete the following administration tasks to configure a home section.

Procedure

1. From the **New Section** window, specify the following fields and click **Save**.

Name	Description
Section ID	Specify the home section identifier. For example, <i><application-code>HomeSection</i> .
Section Title	Specify the section title.
Default Page ID	Specify the page identifier. The default page identifier element refers to the page that is opened when the section is selected. The page must be referenced by a tab so that the associated tab is always found for the section.
Hide Tab Container	Select the check box. The hide tab container element indicates that there is only one tab in the section, and the tab bar is not displayed.

2. Select the section.
3. From the **Tabs** tab, click **Add**.
4. From the **Add Tabs** window, enter the tab name and click **Search**.
5. Select the check box for the tab you want to add and click **Save**.

Home section values for Independent Living

Specify the following values for creating a section for the Independent Living assessment planner home section.

Table 1: New Home section values

Name	Value
Section ID	ILAPAPPHomeSection
Section Title	Home
Default Page ID	ILAssessmentPlannerHome
Hide Tab Container Indicator	True

Table 2: New tab to search for and select

Name	Value
Tab Name	ILAssessmentPlannerHome

Configuring a workspace section

Complete the following administration tasks to configure a workspace section.

Procedure

1. From the **New Section** window, specify the following fields and click **Save**.

Name	Description
Section ID	Specify the home section identifier, for example <i><application-code>WorkspaceSection</i> .
Section Title	Specify the section title.
Default Page ID	Specify the page identifier. The default page identifier element refers to the page that is opened when the section is selected. The page must be referenced by a tab so that the associated tab is always found for the section.
Hide Tab Container	Leave the check box as blank. The hide tab container element indicates that there is only one tab in the section, and the tab bar is not displayed.

2. Select the section.
3. From the **Shortcuts Panel** tab, click **New Shortcuts Group**.
4. From the **New Shortcuts Group** window, specify the following fields.

Name	Description
ID	Enter the short group identifier.
Title	Enter the short group title name to be displayed.

5. Select **Edit** to change the shortcuts panel title and click **Save**.
6. Repeat step 3, 4 and 5 to add extra shortcuts groups to the workspace section.
7. From the group that you created, click **New Link**. Specify the following fields and click **Save**.

Name	Description
Link ID	Specify the link identifier. The link identifier must be referenced in the workspace section so that the associated tab is always found. For example, <code><sc:tab id="<link-id>" /></code>
Page ID	Specify the page identifier. The default page identifier element refers to the page that is opened when the shortcuts link is selected. The page must be referenced by a tab so that the associated tab is always found for the link.
Title	Specify the title to be displayed for the link.
Open As Modal	Select the check box to open the link as a modal window.

8. Repeat step 7 to add links for each group created.
9. From the **Tabs** tab, click **Add**. Specify the **Tab Name** and click **Search**. Select the tab check box and click **Save**.
10. Repeat step 9 to add the associated tabs for the links added. The page added during a new link creation must be referenced by a tab so that the associated tab is always found for the link.

Workspace section values for Independent Living

Specify the following values for creating a section for the Independent Living assessment planner workspace.

Table 3: New Section values

Name	Value
Section ID	ILAPAPPWorkspaceSection
Section Title	Outcome Plans
Default Page ID	Leave blank.
Hide Tab Container Indicator	Leave the check box blank.

Table 4: New Outcome Plans shortcuts group values

Name	Value
ID	OutcomePlans
Title	Outcome Plans

Table 5: New Outcome Plans link values

Link ID	Page ID	Title
MyOutcomePlans	OutcomePlan_listByOwner	My Outcome Plans
NewOutcomePlan	OutcomePlan_create	New Outcome Plan

Table 6: New Searches shortcuts group values

Name	Value
ID	Searches

Name	Value
Title	Searches

Table 7: New Searches link values

Link ID	Page ID	Title	Open as Modal
OutcomePlanSearch	OutcomePlan_search	Outcome Plan	Yes
PersonSearch	Person_search1	Person	No
CaseSearch	Case_search1	Case	No

Table 8: Search tabs

Search Tabs
OutcomePlanSearch
PersonSearch
CaseSearch

Configuring an application banner

An application banner is what is displayed at the top of the page when a user logs in to an application. The four configurable aspects of the banner are the application name, application subtitle, welcome message for the logged in user, and the application menu. Complete the following administration tasks to configure an application banner.

Procedure

1. From the **Administration Workspace > User Interface > Application Management**, click **New Internal Application**.
2. From the **New Application** window, specify the following fields and click **Save**.

Name	Description
ID	The application code identifier. The application code identifier is linked to the Users entity through the <i>CT_APPLICATIONCODE.ctx</i> code table.
Component	Specify the custom component the application is contained within.
Application	Specify the application user full name.
Welcome Message	Specify the welcome message that is displayed to the user when they view the application workspace. For example, <i>Welcome %user-full-name</i> .

3. Click **Edit**.
4. Click **Edit Application**, specify the following fields and click **Save**.

Name	Description
Preference Link	Select the preference link check box to enable the display of the preferences on the application banner.

Name	Description
Logout Link	Select the log out link check box to enable the display of logout on the application banner.
Preference Title	Specify the preference title.
Logout Title	Specify the log out title.

5. Select **Application Search > Change Search Type**.
6. From the **Change Search Type** window, select **Single Default Search Page** from the drop-down list and click **Save**.
7. Click **Edit** and specify the following fields and click **Save**.

Name	Description
Default Search Page	Specify a default search page.
Initial Text	Specify the text that is displayed inside the search text field.

8. Select the **Sections** tab and click **Add**.
9. From the **Add Sections** window, enter the section title and click **Search**.
10. Select the check boxes for sections you want to add to the application.

Workspace banner values for Independent Living

Specify the following values for creating an application for the Independent Living assessment planner workspace section.

Table 9: New application values

Name	Value
ID	ILAPAPP
Component	Cúram
Application	Outcome Planner
Welcome Message	Welcome %user-full-name

Table 10: New application values

Name	Value
Preference Link	True
Logout Link	True
Preference Title	Preferences
Logout Title	Log out

Table 11: Search values

Name	Value
Default Search Page	OutcomePlan_resolveByReference
Initial Text	Enter a Plan Reference Number

Table 12: Sections added

Sections
ILAPAPPHomeSection
ILAPAPPWorkspaceSection
DefaultAppCalendarSection
DefaultAppInboxSection

Configuring an application code

An application code is what is used to link a home page to an application. Complete the following administration tasks to configure an application code.

Procedure

1. Log in to Cúram as a user with the system administrator credentials.
2. Select the **System Configurations** tab, expand the **Shortcuts** menu, and click **Application Data > Code Tables**.
3. From the **Search Criteria** cluster, enter the **Application Code** and click **Search**.
4. From the **Application Code**, click **New Item**.
5. From the **New Code Table Item** window, specify the following fields and click **Save**.

Name	Description
Item Name	Specify the item name, which is the name of the page you want to link the application to.
Technical ID (Code)	Specify the application code.

6. Click **Publish** and click **Yes**.

Application data code table values for Independent Living

Specify the following values for linking the assessment planner home page to the application code for Independent Living.

Table 13: New application values

Name	Value
Item Name	ILAssessmentPlannerHome
Technical ID (Code)	ILAPAPP

Configuring a user

A user is somebody who is employed by the organization to perform tasks on the system, such as creating and managing cases. Complete the following administration tasks to configure a user.

Procedure

1. Log in to Cúram as a user with the administrator credentials.
2. From the **Administration Workspace > Shortcuts > Users**, click **New User**.
3. From the **New User** window, specify the following fields and click **Save**.

Name	Description
Title	Select the title for the user from the drop-down list. The title is a form of Nomenclature identifying the User's status.
First Name	Specify the first or given name of the user.
Last Name	Specify the common name, or the hereditary name, of the user.
Location	Select the search icon. From the Locations window, select the location from the list. The location is a unique reference for the location within the Organization where a Staff Member (User) is located.
Personal Email	Specify the personal email record for the user.
Username	Specify the name of the user. The name is the unique identifier for the user.
Password	Specify the user password, which is used for logging in to Curam.
Application	Select the home page from the drop-down list. The home page is linked to the user application code, which is stored in the <code>CT_APPLICATION_CODE.ctx</code> file.
Role Name	Select the search icon. From the Security Roles window, select the role. The role is assigned by the system to a Security Group record.
Account Enabled	Select the check box to enable the account. The indicator specifies that an account is enabled or not.

User values for Independent Living

Specify the following values for creating the assessment planner user for Independent Living.

Table 14: New user values

Name	Value
Title	Mr
First Name	INDEPENDENT LIVING
Last Name	PLANNER
Location	Springfield
Personal Email	financialuser@curamsoftware.com
Username	ilplanner
Password	password
Application	ILAssessmentPlannerHome
Role Name	PLANNERROLE
Account Enabled	True

Assigning a user to an organization unit and a position

All users in an organization have a position within an overall organization structure. The organization structure itself can consist of one or more organization units. Complete the following steps to assign a user to an organization unit and a position.

Procedure

1. From the **Administration Workspace > Shortcuts > Organization > My Organization**, and select the **Structures** tab.
2. From the **Organization Structures** window, select an **Organization Structures** name.
3. Select the **Organization Units** tab and select an **Organization Units** name.

4. Select the **Positions** tab.
5. From the list of positions, select the action menu for the position you want to assign the user to and click **Assign User**.
6. From the **Assign User** window, select the search icon and enter the name in the search criteria. Click **Search**.
7. From the **Search Results**, select the user record and click **Save**.

Assign the assessment planner a position for Independent Living

Specify the following values for assigning the assessment planner user to a position for Independent Living.

Name	Value
Organization Structures	Midway Social Welfare Plan '03
Organization Units	Board of Directors
Position	Chief Executive Officer
Assign User	INDEPENDENT LIVING PLANNER

Configuring quick links

Quick links are a collection of links to frequently used application pages, which allow users to complete common actions. For example, searching for a person or accessing a page with a list of the cases that are assigned to the user. Complete the following steps to add quick links to an application view.

Procedure

1. From the **Administration Workspace > Shortcuts > User Interface > Quick Links by Application View**.
2. From the application, select **Add Existing**.
3. From the **Add Quick Link To Application** window, select from the available check boxes and click **Save**. It is advised for usability purposes that the number of quick links to not exceed 7.

Quick links values for Independent Living

Specify the following quick links to be displayed on the assessment planner home page quick link pod.

Name	Value
Application	ILAssessmentPlannerHome
Quick Links	Select the following quick links: <ul style="list-style-type: none"> • New Outcome Plan • My Outcome Plans • Outcome Plan Search • Search for a Person • Search for a Case • Search for a Person • Register a Person • My Cases

Customizing tab navigation

It is possible to customize, or override, the behavior of tab navigation in Curam.

About this task

This is a generic task on how to customize the behavior of tab navigation. The variable values are specified in a sub topic.

Procedure

1. Locate the tab navigation file whose behavior you want to override.
2. Copy the file, and its associated properties file, into `%CURAM_DIR%\EJBServer\components\COMPONENT_NAME\clientapps`.
`%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.
3. Update the file by adding the additional navigation pages that you want available on the tab.
4. If there are associated properties, add them to the properties file that was copied across.
5. From `%CURAM_DIR%\EJBServer`, run **build inserttabconfiguration**.
6. Save your configuration files.

Custom person home tab navigation values for Independent Living

Specify the additional custom navigation page and associated property that is required for the person home tab navigation for Independent Living.

Additional entry for <i>PersonHome.nav</i>
<pre><nc:navigation-page id="OutcomePlan" page-id="OutcomePlan_listByParticipant" title="Page.Title.OutcomePlans"/></pre>
Additional entry for <i>PersonHome.properties</i>
<pre>Page.Title.OutcomePlans=Outcome Plans</pre>

Saving your user application view configurations

Save your changes to the user application view configurations.

Quick reference for saving user application view configuration files

Reference table for all files that are associated with saving your user application view configuration files.

The following descriptions detail each column of the reference table and what their purpose is.

- **Task Name:** The name of the current task.
- **Data Contained In:** The relevant file or files in the `%CURAM_DIR%\EJBServer\build\dataextractor` folder, which contains data that you need to extract for the step.
`%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.
- **Files To Be Copied From Data Extractor:** A list of files that the user must copy from the `%CURAM_DIR%\EJBServer\build\dataextractor` folder for each task.

- Files To Be Created: A list of files that need to be created by the user for each task.

Table 15: User Application View File Reference Table

Task Name	Data Contained In	Files To Be Copied From Data Extractor	Files To Be Created
Saving the personalized pod pages configurations	PAGECONFIG .dmx USERPAGECONFIG .dmx	PAGECONFIG .dmx USERPAGECONFIG .dmx	
Creating the application view configuration files	APPRESOURCE .dmx		ILAPAPP .app ILAPAPP .properties ILAPAPPHomeSection .sec ILAPAPPHomeSection .properties ILAPAPPWorkspaceSection .sec ILAPAPPWorkspaceSection .proper ILAPAPPWorkspaceSectionShortcu ILAPAPPWorkspaceSectionShortcu ILAssessmentPlannerAppHome .tab ILAssessmentPlannerAppHome .pro
Saving the application code configurations	CODETABLEITEM .dmx		CT_APPLICATION_CODE .ctx
Saving the user configuration files	USERS .dmx USERLINK .dmx POSITIONHOLDERLINK .dmx	USERS .dmx USERLINK .dmx POSITIONHOLDERLINK .dmx	
Saving the user quick links configurations	QUICKLINK .dmx QUICKLINKAPPLICATION .dmx	QUICKLINK .dmx QUICKLINKAPPLICATION .dmx	
Creating an application home page			ILAssessmentPlannerHome .uimILA

Saving the personalized pod pages configurations

Complete the following steps to extract the specified personalized pod page DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the **build extractdata** build target.
2. From the %CURAM_DIR%\EJBServer\build\dataextractor directory, copy the following DMX files.

Note: %CURAM_DIR% is the Cúram installation directory, which by default is C:\Merative\Curam\Development.

Name	Description
PAGECONFIG .dmx	Stores page templates for the personalized pages. The identifiers are referenced from the CT_PodType .ctx code table.
USERPAGECONFIG .dmx	Stores user-specific settings for the personalized pages, including default settings by user role. The identifiers are referenced from the CT_PodType .ctx code table.

3. Inside PAGECONFIG .dmx and USERPAGECONFIG .dmx, you must find the attribute with name="config" and change its type from blob to text.
4. The second step is to replace all < symbols with < and replace all > symbols with >

5. Inside *USERPAGECONFIG.dmx*, you must find the record with a *userPageConfigID* value of 4500 and change its *pageid* from *ASCEligibilityWorkerHome* to *ASCEligibilityWorkerHome2*. This change avoids the Adult Social Care user workspace configuration being overridden by an Intake user workspace configuration.
6. From *%CURAM_DIR%\EJBServer*, run **build database**.
7. Save your configuration files.

Personalized pod values for Independent Living

The assessment planner home page configuration files specific to Independent Living.

File name	Location
<i>UserPageConfig.dmx</i>	<i>%CURAM_DIR%\EJBServer\components\IndependentLiving\data</i>
<i>PageConfig.dmx</i>	<i>\initial</i>
<p>Note: <i>%CURAM_DIR%</i> is the Cúram installation directory, which by default is <i>C:\Merative\Curam\Development</i>.</p>	
<i>CT_PodType.ctx</i>	<i>%CURAM_DIR%\EJBServer\components\core\codetable</i>

Creating the application view configuration files

The section, tab, and application management configurations are stored in *APPRESOURCE.dmx*. The associated *blob* files that are extracted from the database need to be converted into the associated *.app*, *.sec*, *.ssp*, *.tab*, *.nav*, *.mnu*, and *.properties* files.

Procedure

1. Extract the DMX files from the database with the *extractdata* build target.
2. From the *%CURAM_DIR%\EJBServer\build\dataextractor* directory, search for the *<application-code>* in the *APPRESOURCE.dmx* file.
%CURAM_DIR% is the Cúram installation directory, which by default is *C:\Merative\Curam\Development*.
3. For each of the rows that are returned in the search results, the *blob* files are specified in the content attribute. Extract all the application resource *blob* files referenced.
4. Rename the *blob* files and store in the *%CURAM_DIR%\EJBServer\components\COMPONENT_NAME\clientapps* directory. XML configuration files that are included with Curam exist in the *%CURAM_DIR%\EJBServer\components\COMPONENT_NAME\tab* directory. The row names that are specified in the *APPRESOURCE.dmx* file are specified here. The names that the associated application resource files need to be renamed to are specified. The ID in the files needs to be the same name as the file name.

Name	Rename File To
<i>curam.config.app.<application-code>.app</i>	<i><application-code>.app</i>
<i><application-code>.properties</i>	<i><application-code>.properties</i>
<i>curam.config.sec.<application-code>HomeSection</i>	<i><application-code>HomeSection</i>
<i><application-code>HomeSection</i>	<i><application-code>HomeSection</i>

Name	Rename File To
<code>curam.config.sec.<application-code>WorkspaceSection.sec</code>	<code><application-code>WorkspaceSection</code>
<code><application-code>WorkspaceSection.properties</code>	<code><application-code>WorkspaceSection.properties</code>
<code>curam.config.ssp.<application-code>WorkspaceSection_SSP</code>	<code><application-code>WorkspaceSectionShortcuts.ssp</code>
<code><application-code>WorkspaceSection_SSP.properties</code>	<code><application-code>WorkspaceSectionShortcuts.properties</code>

5. Search for the `<page-name>` in the `APPRESOURCE.dmx` file.
6. Repeat step 3.

Name	Rename File To
<code>curam.config.tab.<page-name></code>	<code><page-name>.tab</code>
<code><page-name>.properties</code>	<code><page-name>.properties</code>
<code>curam.config.mnu.<page-name>Menu</code>	<code><page-name>Menu.mnu</code>
<code><page-name>Menu.properties</code>	<code><page-name>.properties</code>

7. From `%CURAM_DIR%\EJBServer`, run **build inserttabconfiguration**.
8. Save your configuration files.

User application view files for Independent Living

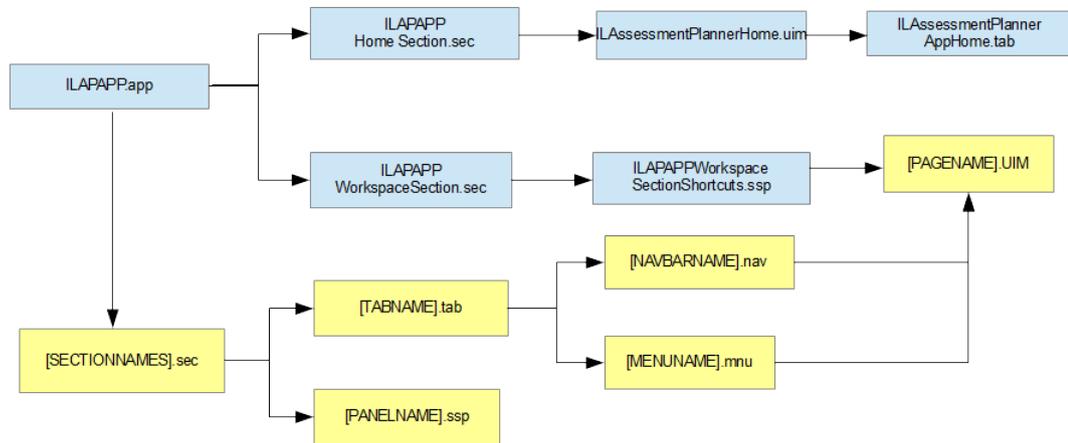
The following table contains details of the configuration files for the Independent Living assessment planner application view.

File name	Description	Location
<code>ILAPAPP.app</code> and the associated properties file.	<p>For each section referenced in the <code>ILAPAPP.app</code> file specific to Independent Living, the related section <code>.sec</code> file must be defined to include the tabs available in each section.</p> <ul style="list-style-type: none"> • The following workspace sections are defined. <ul style="list-style-type: none"> • Home • Outcome Plans • Inbox • Calendar <p>The Home and Outcome Plans sections are customized for Independent Living. The remaining sections, Inbox, and Calendar, use the default sections as defined in the core application. A maximum of 5 sections is advised.</p>	<p><code>%CURAM_DIR%\EJBServer\components\IndependentLiving\tab\ApplicationViews</code></p> <div style="border: 1px solid blue; padding: 5px; background-color: #e6f2ff;"> <p>Note: <code>%CURAM_DIR%</code> is the Cúram installation directory, which by default is <code>C:\Merative\Curam\Development</code>.</p> </div>
<code>ILAPAPPHomeSection.sec</code> and the associated properties file.	<p>The Independent Living Home section references the assessment planner home page.</p>	

File name	Description	Location
<i>ILAPAPPWorkspaceSection</i> and the associated properties file.	<p>The Outcome Plans section specifies the associated tabs, including the core tabs, the common intake tabs, the evidence tabs, and the Independent Living tabs.</p> <p>The Independent Living shortcuts panel is also specified.</p> <p>The person's information is specified in the Outcome Plans section.</p>	
<i>ILAPAPPWorkspaceSection</i> and the associated properties file.	<p>The shortcut links in the Outcome Plans section are defined. The <i>.tab</i> file (id) and <i>.uim</i> (page-id) must also be defined when the shortcut is specified.</p>	
<i>ILAssessmentPlannerApp</i> and the associated properties file.	<p>Defines the assessment planner home tab. The Independent Living assessment planner home page is specified. The page must be referenced in a tab so that the associated tab is always found for the section.</p> <p>The context panel and tab navigation is not configured as part of Independent Living home page.</p> <p>The context panel can be configured to display a specific UIM page that displays common information for the tab that is always viewable.</p> <ul style="list-style-type: none"> • <i><contextpanel>.uim</i> <p>The tab navigation can be configured to group UIM pages as part of a tab can be navigated to within a tab.</p> <ul style="list-style-type: none"> • <i><navigation>.nav</i> 	<p>%CURAM_DIR%\EJBServer \components\IndependentLiving \tab\AssessmentPlannerTabs</p>
<i>ILOutcomePlanMenu.mnu</i> and the associated properties	<p>Defines the content of a tab actions menu.</p>	

Independent Living user application files link diagram

The following image displays the associated links between the user application view files that are created for the Independent Living assessment planner.



Saving the application code configurations

Extract the content from the *CODETABLEITEM.dmx* file and add it to the *CT_APPLICATION_CODE.ctx* code table to save the application code configurations.

Procedure

1. Extract the DMX files from the database with the *extractdata* build target.
2. From the `%CURAM_DIR%\EJBServer\build\dataextractor\CODETABLEITEM.dmx` file, search for the application code configured.
`%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.
3. If there is no pre-existing *CT_APPLICATION_CODE.ctx* code table in the `%CURAM_DIR%\EJBServer\components\COMPONENT_NAME\codetable` directory, create a new code table and add the content from the *CODETABLEITEM.dmx* file. If the code table exists, add the content to the existing code table.

4. From %CURAM_DIR%\EJBServer, run **build ctgen database**.
5. From %CURAM_DIR%\webclient, run **build client**.
6. Save your configuration files.

User application code file for Independent Living

The following is the configuration file that is used for configuring the application code for Independent Living.

File name	Location
CT_APPLICATION_CODE.ctx	%CURAM_DIR%\EJBServer\components\IndependentLiving\codetable

Note: %CURAM_DIR% is the Cúram installation directory, which by default is C:\Merative\Curam\Development.

Saving the user configuration files

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the *extractdata* build target.
2. From the %CURAM_DIR%\EJBServer\build\dataextractor directory, copy the following DMX files.

Note: %CURAM_DIR% is the Cúram installation directory, which by default is C:\Merative\Curam\Development.

File name	Description
USERS.dmx	Stores user information.
USERLINK.dmx	Stores a link between the user name and user ID.
POSITIONHOLDERLINK.dmx	Stores a link between a position and a user.

3. From %CURAM_DIR%\EJBServer, run **build database**.
4. Save your configuration files.

User configuration files for Independent Living

The following are the configuration files that are used for configuring the eligibility worker for Independent Living.

File name	Location
USERS.dmx	%CURAM_DIR%\EJBServer\components\IndependentLiving\data\demo
USERLINK.dmx	
POSITIONHOLDERLINK.dmx	<div style="border: 1px solid blue; padding: 5px;"> <p>Note: %CURAM_DIR% is the Cúram installation directory, which by default is C:\Merative\Curam\Development.</p> </div>

Saving the user quick links configurations

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the *extractdata* build target.
2. From the `%CURAM_DIR%\EJBServer\build\dataextractor` directory, copy the following DMX files.

Note: `%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

File name	Description
<code>QUICKLINK.dmx</code>	When a user logs in to the system, any quick links that are associated with their role are displayed on their home page. Quick links are shortcut links, which can be included within a user role home page Quick Links pod. All quick links are defined in the <code>QUICKLINK.dmx</code> file.
<code>QUICKLINKAPPLI</code>	<p>Defines the quick links for the application. The quick links act as shortcuts for users for commonly accessed parts of an application, for example, the Financial or Case Worker Application.</p> <p>A Quick Links pod is displayed on a user role home page. The quick link must be associated with the user role for it to display in the Quick Links pod. For each quick link to be displayed in the Quick Links pod of a user role home page, an entry must be added to <code>QUICKLINKAPPLICATIONLINK.dmx</code></p>

3. From `%CURAM_DIR%\EJBServer`, run **build database**.
4. Save your configuration files.

User quick links files for Independent Living

The following are the DMX files specific to creating quick links for the Independent Living assessment planner user home page.

File name	Location
<code>QUICKLINK.dmx</code>	<code>%CURAM_DIR%\EJBServer\components\AssessmentPlanning\data\initial</code> <code>%CURAM_DIR%\EJBServer\components\core\data\demo</code>
<code>QUICKLINKAPPLICATIONLINK.dmx</code>	<code>%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial</code>

Note: `%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

Configuring outcome plans

Complete the following tasks to configure an outcome plan and to save your outcome plan configurations.

Configuring outcome plans

You can configure outcome plans to address and manage the needs that are identified during the assessment.

Configuring goals

An outcome plan is created to assist a client in achieving a goal. You can configure a goal so that it can be specified for an outcome plan, or so that the goal can be specified for each client on an outcome plan.

Configuring a goal

Goals can be defined by an administrator and then shared across multiple types of outcome plans. Once configured, a goal can then be added to an outcome plan by a caseworker. Complete the following steps for configuring a goal.

Procedure

1. Select the **Administration Workspace** tab, expand the **Shortcuts** menu, select **Outcome Management > Goals > New**.
2. From the **New Goal** window, enter the following details to create a new goal.

Name	Description
Name	The localizable name of the outcome plan. The name must be specified, for example, "Self-Sufficiency", "Reunification", "Maintain Employment".
Reference	A reference can be specified which allows the goal to be referenced in code.
Description	The localizable description of the Outcome Plan Goal.

3. Click **Save**.

Goal values for Independent Living

Specify the following values for configuring a goal for Independent Living.

Name	Value
Name	Independent Living
Reference	blank
Description	The aim of independent living is to empower and enable people to achieve choice and control over their lives and full participation as equal citizens in society.

Configuring actions

You can configure an action so that it can be specified on an outcome plan for multiple clients. An action can have a cost associated with it. It can also be configured to indicate if participation tracking is required, and whether the client or the caseworker is responsible for the action.

Actions

An action is a type of activity that can be added by a caseworker to a clients outcome plan.

An action can be selected manually by a caseworker and added to an outcome plan. You can also configure an action such that it is recommended for addition to the outcome plan by the system. An action can be recommended in two ways. You can configure an action from the outcome plan such that it is recommended when that outcome plan is created for a client. You can also configure an action from an assessment definition factor such that the action is recommended when a client achieves a particular result from being assessed.

You can add keywords or evidence to an action from the actions list.

When you configure an action, you can specify a reference so that the action can be referenced in code. The remaining action configuration options are as follows.

Configuring an action

Complete the following steps to configure an action.

About this task

You must configure an action in the administration application before you can add it to an outcome plan. After you define an action, you can add it to an outcome plan to address a client needs.

Procedure

1. Select the **Administration Workspace** tab, expand the **Shortcuts** menu, select **Outcome Management > Actions > New**.
2. From the **New Action** window, enter the appropriate details.

Name	Description
Name	The localizable name for this type of action.
Reference	The unique reference of this type of action.
Cost Model	<p>The Cost Model drop down list allows an administrator to define the cost associated with the action. Three values are available for selection: No Cost, User Specified Costs, and Fixed Actual.</p> <p>If No Cost is specified, it means that there is no cost associated with the action and as a result no cost information is displayed for this action on an outcome plan.</p> <p>If User Specified Costs is specified, it means that the estimated and actual cost can be specified by a user when creating and completing the action. An estimated cost field is displayed when adding the action to an outcome plan allowing a user to specify the estimated cost of the action. An actual cost field is displayed when completing the action allowing a user to specify the actual cost of the action.</p> <p>If Fixed Actual is specified, it means that a fixed cost is associated with the action. If this is specified, a fixed cost must be specified when administering the action. This cost is then displayed to a user when adding an action to an outcome plan.</p>
Fixed Cost	Indicates the fixed cost of this type of action.

Name	Description
Multiple Clients	The multiple clients indicator allows an administrator to define whether a single client or multiple clients can be selected when adding the action to an outcome plan. If this indicator is switched on, multiple clients can be added to the action. A multi select list is provided when adding the action to an outcome plan which allows multiple clients to be selected. If this indicator is switched off, only one client can be selected when adding an action to an outcome plan. A drop down list is displayed allowing only one client to be selected..
Client Participation	The Client Participation indicator allows an administrator to define whether participation needs to be specified when creating an action on an outcome plan. When this indicator is switched on, a frequency and duration are displayed and must be specified when adding an action to an outcome plan. This indicator also allows actual participation to be recorded for an action. When this indicator is switched off, participation cannot be recorded on the action i.e. a frequency and duration are not displayed when creating the action and actual participation cannot be recorded for the action.
Responsibility	Indicates who is responsible for this type of action. This dictates what gets displayed to the user when creating an action of this type on the delivery side. For more information about responsibilities, see the <i>Outcome Management Configuration Guide</i> .
Owner	Indicates who can own this type of action. This dictates what gets displayed to the user when creating an action of this type in the delivery side. The Owner drop down list allows an administrator to define how the owner is assigned to an action. Two values are available for selection: 'User Creating Action', 'Any User'. If 'User Creating Action' is specified, the owner of the action is automatically assigned to the user who is adding the action to the outcome plan. If 'Any User' is specified, the owner can be specified by the user creating the action. The user will be able to search for a user when adding the action to the outcome plan.
Create SID	Specifies the creation rights for this type of action.
Modify SID	Specifies the modification rights for this type of action.
Exclude from Availability Check	Indicates if this action should be excluded from the list of scheduled appointments returned when a user checks the clients availability.
Description	The localizable description for this type of action.
List Preview	The drop-down preview view that is used when the user selects the toggle for an action that is displayed in a list view. This configuration is optional and is read from a property if it is left blank.
Home Page	You can specify a home page for a plan action. This configuration is optional and is read from a property if it is left blank.
Rename Allowed	Where you want to give case workers the flexibility to rename actions, use the Rename Allowed property to enable an action to be renamed from the outcome application.

3. Click **Save**.

Action values for Independent Living

Specify the following values for configuring actions for Independent Living.

Table 16: Actions configured

Name	Description
Advise on Psychiatric Services	Advise on Psychiatric Services. Psychiatric services can be provided where an assessor feels that they are appropriate.
Advise on Secure Care	Advise on Secure Care. Some clients may require secure accommodation and care.
Budgeting Services	Budgeting Services. Help with money management, bill paying etc.
Feeding / Carer Services	Feeding / Carer Services. Feeding is part of general carer services.
Housekeeping Services	Housekeeping Services. This could include cleaning and vacuuming the home. Ensuring that the home is a pleasant environment to live in.
Nursing Services	Nursing services are available where a client has a medical condition that requires qualified nursing care.
Shopping / Carer Services	Shopping / Carer Services. Assisting the client with the shopping list, purchasing the goods and storing them in their proper location in the home where the client can retrieve them.
Toilet / Carer Services	Toilet / Carer Services. Assisting the client in the use of the toilet, ensuring that they are comfortable.
Washing / Carer Services	Washing / Carer Services. Washing, bathing the client is part of general services that a carer would be expected to perform.
Wheelchair Service	Wheelchair Services. The client requires wheelchair assistance to get around.

Table 17: Common configurations across all actions configured for Independent Living

Name	Value
Client Participation	True
Responsibility	User Creating Action
Owner	User Creating Action

Configuring progress

You can configure progress values so that the caseworker can record the progress on an outcome plan.

Progress

Progress is an indication of how well the activities on the outcome plan address the client needs.

The progress values that can be selected by a case worker when recording progress on an outcome plan must be defined in administration. An icon can also be configured for each value that is displayed when the associated progress value is recorded for a client on the outcome plan.

The value must be specified and represents the progress values that can be selected by a case worker on an outcome plan, for example, 'Good', 'Bad', 'Excellent'. The Resource Name

represents the name of the icon that is selected in the **Icon** field and is required so that the icon can be stored in application resources.

Configuring a progress value

Complete the following steps for configuring a progress value.

Procedure

1. Select the **Administration Workspace** tab, expand the **Shortcuts** menu, select **Outcome Management > Progress > New**.
2. From the **New Progress Value** window, enter the following details to create a new progress.

Name	Description
Value	The Value must be specified and represents the progress values that can be selected by a caseworker on an outcome plan, for example, 'Good', 'Bad', 'Excellent'.
Resource Name	The Resource Name represents the name of the icon that is selected in the Icon field and is required so that the icon can be stored in application resources.
Icon	An icon can also be configured for each value, which is displayed when the associated progress value is recorded for a client on the outcome plan

3. Click **Save**.

Progress values for Independent Living

Specify the following progress values for Independent Living.

Value	Resource Name	Icon
Excellent	ExcellentProgress	<code>%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial\blob\ExcellentProgress.png</code>
Good	GoodProgress	<code>%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial\blob\GoodProgress.png</code>
Moderate	ModerateProgress	<code>%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial\blob\ModerateProgress.png</code>

Note: %CURAM_DIR% is the Cúram installation directory, which by default is C:\Merative\Curam\Development.

Value	Resource Name	Icon
Poor	PoorProgress	%CURAM_DIR% \EJBServer\components \IndependentLiving \data\initial\blob \PoorProgress.png

Configuring outcome plans

You can configure outcome plans to address and manage the needs that are identified during an assessment.

Configuring an outcome plan

Complete the following steps for configuring an outcome plan.

Procedure

1. Select the **Administration Workspace** tab, expand the **Shortcuts** menu, select **Outcome Management > Outcome Plans > New**.
2. From the **New Outcome Plan** window, enter the following details to create a new outcome plan.

Table 18: Outcome plan

Name	Description
Name	The localizable name of the outcome plan.
Reference	A reference field so that the outcome plan can be referenced within code. The reference field is unique across all active outcome plans.
Home Page	A home page can be specified such that the default outcome plan home page can be overridden to use a different home page.
Goals Applicable To	<p>The drop-down list allows an administrator to define the level at which a goal can be added to an outcome plan in the caseworker application. The options available are</p> <ul style="list-style-type: none"> • Outcome Plan Only • Clients Only • Outcome Plan • Clients <p>Specifying Outcome Plan Only means that a goal can be created at the outcome plan level only.</p> <p>Specifying Clients Only means that a goal can only be created for clients on the outcome plan, a goal cannot be added at the outcome plan level.</p> <p>Specifying Outcome Plan and Clients means that a goal can be added at either the outcome plan level or for a client on the outcome plan.</p>
Agreement Approval Check	Agreement approval checks determine the percentage of outcome plan agreements that must be reviewed by a case supervisor.

Name	Description
Ownership Strategy	<p>On the creation of an outcome plan, the ownership of the outcome plan is automatically assigned to the user which, created the outcome plan.</p> <p>If an agency wants to define their own outcome plan ownership processing, the default processing can be overridden by specifying an ownership strategy for the creation of an outcome plan. The Ownership Strategy list allows an administrator to select a work flow, which can be used to assign an owner to an outcome plan instead of using the default processing.</p>
Description	The localizable description of the outcome plan administration.

Table 19: Multidisciplinary Team

For more information about configuring multidisciplinary teams, see the *Social Enterprise Collaboration Configuration Guide*.

Name	Description
Type	<p>Multidisciplinary team configurations allow an administrator to define the type of multidisciplinary team that can be added to an outcome plan. A 'Pre-defined Team' or an 'Ad hoc' team can be selected from the multidisciplinary team type drop-down list.</p> <p>If 'Pre-defined Team' is specified, a caseworker must select from a list of teams that are pre-configured in the multidisciplinary team administration to add a team to the outcome plan.</p> <p>If 'Ad hoc' is specified, a caseworker can add individual multidisciplinary team members to the outcome plan.</p>
Sharing Enabled	<p>If a multidisciplinary team is added to an outcome plan, information can be shared with the members of the multidisciplinary team. It can be accessed by team in the multidisciplinary team portal.</p> <p>For example, a caseworker can specify that certain multidisciplinary team members can view certain notes and attachments from the portal. An agency might not want to share information in this way. The Sharing Enabled indicator allows an administrator to dictate if information is shared with multidisciplinary team members or not.</p> <p>If the Sharing Enabled indicator is off, a caseworker is not provided with the ability to share information with multidisciplinary team members. Information is not visible in the portal for the selected outcome plan.</p> <p>If the Sharing Enabled indicator is on, a caseworker is given the option to share certain information with multidisciplinary team members. The information that can be shared is configured in multidisciplinary team member administration.</p>

Name	Description
Portal Home Page	<p>When information is shared from an outcome plan, it is accessed in the multidisciplinary team portal. Information from social enterprise folders (SEF) and Investigation cases is also viewable in the portal. It is necessary for each case type to have their own home page since each case contains different information.</p> <p>A default home page is provided for a SEF, investigation, and an outcome plan. However, if an agency wants to override the default home page, a different home page can be defined for an outcome plan that uses the Portal Home Page field.</p>

Table 20: User Creation Options

An action, factor, and objective can be added to an outcome plan without the need to administer them in outcome management administration. Agencies might not want the caseworker to add these types of user-defined items since they are difficult to report on. Agencies might want to use a more standardized approach to outcome planning. To cater for this the Create Action, Create Factor and Create Objective indicators allow an administrator to dictate if a caseworker can add these types of user-defined items.

Name	Description
Create Actions	<p>If the Create Action indicator is turned on, a caseworker is allowed to add user-defined actions to an outcome plan.</p> <p>If the Create Action indicator is turned off, an action must be selected from a pre-defined list of actions.</p>
Create Objectives	<p>If the Create Objective indicator is turned on, a caseworker is allowed to add user-defined objectives to an outcome plan.</p> <p>If the Create Objective indicator is turned off, an objective must be selected from a pre-defined list of objectives.</p>
Create Factors	<p>If the Create Factor indicator is turned on, a caseworker is allowed to add user-defined factors to an outcome plan.</p> <p>If the Create Factor indicator is turned off, a factor must be selected from a pre-defined list of factors.</p>

Table 21: Review Options

Name	Description
First Review (days)	<p>You can configure the date on which the first review of a plan takes place with the First Review (days) field. It is used in combination with the plan creation date to derive a next review date.</p> <p>For example, if this field is set to 30 days and an outcome plan was created on the 01/01/2014, the next review date (the first review) is set to 31/01/2011.</p>
Frequency Calculation	<p>The Frequency Calculation can be based on the 'Scheduled Date' or the 'Previous Review Completion Date'.</p> <p>If the review frequency calculation is set to 'Previous Review Completion Date', and a previous review does not exist, then the next review date is based on the 'scheduled date'.</p>
Frequency (days)	<p>You can specify a review frequency that allows an administrator to dictate the next review date for subsequent reviews. The Frequency is used with the Frequency Calculation list.</p>

Table 22: Visits

Name	Description
Visits Applicable	<p>The administrator indicates whether visitation plans and visits are applicable to the outcome plan. Visitation plans allow a caseworker to specify and describe planned interactions that occur between individuals.</p> <p>For example, for Child Welfare, visitation plans describe those interactions between the child in out-of-home placement and family members (parents or relatives) or other participants. If visits are configured for an outcome plan, the Visits tab is displayed on an outcome plan. The visitation plans and visitation logs can be created and the caseworker can also evaluate visits as part of a review.</p> <p>Visits are evaluated as part of the plan review process. To assist the caseworker in performing visit evaluations, the system calculates visit compliancy and displays a compliancy level for each client and visitor.</p> <p>This calculation is based on visitation plans for each client and visitor, which overlap with the applicable review period. The system calculates the compliancy of actual visits against the planned visits set out in a visitation plan.</p> <p>In order to calculate compliancy, a number of factors are taken into account, such as the duration of the visit, reschedule reasons for rescheduled visits and method of contact. Some of these factors, namely method of contact, frequency of visits and expected duration, are specified on the visitation plan. There are also a number of configuration settings, including acceptable duration, compliancy levels and reschedule reasons, that are used in the compliancy calculation.</p>
Acceptable Duration (%)	<p>The acceptable duration is set for an outcome plan type. This configuration is provided for the administrator to set the percentage of the visit duration that is acceptable for compliancy purposes.</p> <p>For example, if the acceptable duration is set to 50%, and the expected duration set out in the visitation plan is 1 hour, any visits that occur for that visitation plan, that have a duration of 30 minutes or more, is considered compliant from a duration perspective. Any visits that are less than 30 minutes are not considered compliant and are excluded from the compliancy calculation.</p>

Name	Description
Lower Age Limit	The administrator can also specify the age range for the clients to be visited for an outcome plan.
Upper Age Limit	For example, on a Child Welfare plan, where visit criteria between caregivers and children are set out on a visitation plan. The lower age limit might be set to 0 and the upper age limit might be set to 21. It means that only the children aged 21 and under can be added as clients to visit on the visitation plan.

3. Click Save.

Outcome plan values for Independent Living

Specify the following values for configuring an outcome plan for Independent Living. Multidisciplinary team configurations are not required.

Table 23: Outcome plan

Name	Value
Name	Needs Outcome Plan
Reference	NeedsAssess
Home Page	blank
Goals Applicable To	Outcome Plan Only
Agreement Approval Check	blank
Ownership Strategy	blank
Description	Needs Outcome Plan Description

Table 24: User Creation Options

Name	Value
Create Actions	True
Create Objectives	True
Create Factors	True

Table 25: Review Options

Name	Value
First Review (days)	30
Frequency Calculation	Scheduled Date
Frequency (days)	30

Associating goals with an outcome plan

You can configure one or more goals to be associated with a type of outcome plan. The associated goals are then available for a caseworker to add as an outcome plan goal or a client goal on an outcome plan.

Associating a goal

Complete the following steps to associate a goal with an outcome plan.

Procedure

1. From the outcome plan, select the **Goals** tab and click **Add**.
2. From the **Add Goals** window, select the check box for the goals you want to add to the outcome plan and click **Save**.

Goals associated with the outcome plan for Independent Living

For the Needs Outcome Plan, there is only one goal associated called Independent Living, which is specified for Independent Living.

Saving your outcome plan configurations

After you have configured an outcome plan, you must manually save all of the outcome plan configurations to ensure that they are not overwritten when you do a build database target.

Quick reference for saving outcome plan configuration files

Reference table for all files that are associated with saving your outcome plan configuration files.

The following descriptions detail each column of the reference table and what their purpose is.

- **Task Name:** The name of the current task.
- **Data Contained In:** The relevant file or files in the `%CURAM_DIR%\EJBServer\build\dataextractor` folder, which contains data that you need to extract for the step. `%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.
- **Files To Be Copied From Data Extractor:** A list of files that the user must copy from the `%CURAM_DIR%\EJBServer\build\dataextractor` folder for each task.
- **Files To Be Created:** A list of files that need to be created by the user for each task.

Table 26: Outcome Plan File Reference Table

Task Name	Data Contained In	Files To Be Copied From Data Extractor	Files To Be Created
Saving your goal configuration files		<code>OUTCOMEPLANGOALADMIN.dmx</code>	<code>LOCALIZABLETEXT.dmx</code> , <code>TEXTTRA</code>
Saving your action configuration files		<code>OUTCOMEPLANACTIONADMIN.dmx</code>	<code>LOCALIZABLETEXT.dmx</code> , <code>TEXTT</code>
Saving your progress configuration files		<code>PROGRESSADMIN.dmx</code>	<code>APPRESOURCE.dmx</code> , <code>LOCALIZABLETEXT.dmx</code>
Saving your outcome plan configuration files		<code>OUTCOMEPLANADMIN.dmx</code>	<code>APPROVALREQUEST.dmx</code> , <code>LOCALIZABLE</code>
Saving your outcome plan goal association configuration files		<code>OUTCOMEPLANGOALADMINLINK.dmx</code>	

Saving your goal configuration files

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the *extractdata* build target.
2. From the `%CURAM_DIR%\EJBServer\build\dataextractor` directory, copy the following DMX files.

File name	Description
<code>OUTCOMEPLANGOALADMIN.dmx</code>	This entity stores goals that can be added to an outcome plan.
<code>LOCALIZABLETEXT.dmx</code>	This entity holds a link to text translations for descriptions that appear throughout the application.
<code>TEXTTRANSLATION.dmx</code>	This entity holds the text translation for various locales.

Note: `%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

3. From `%CURAM_DIR%\EJBServer`, run **build database**.
4. Save your configuration files.

Goal configuration files for Independent Living

The Independent Living goal configuration files are in the following location in the accelerator.

Table 27: DMX files

File name	Location
<code>OUTCOMEPLANGOALADMIN.dmx</code>	<code>%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial</code>

Note: `%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

Saving your action configuration files

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the *extractdata* build target.
2. From the `%CURAM_DIR%\EJBServer\build\dataextractor` directory, copy the following DMX files.

File name	Description
<code>OUTCOMEPLANACTIONADMIN.dmx</code>	This entity stores activities that can be added to an outcome plan.
<code>LOCALIZABLETEXT.dmx</code>	This entity holds a link to text translations for descriptions that appear throughout the application.
<code>TEXTTRANSLATION.dmx</code>	This entity holds the text translation for various locales.

Note: %CURAM_DIR% is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

3. From %CURAM_DIR%\EJBServer, run **build database**.
4. Save your configuration files.

Action configuration files for Independent Living

The Independent Living action configuration files are in the following location in the accelerator.

Table 28: DMX files

File name	Location
OUTCOMEPLANACTIONADMIN.dmx	%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial

Note: %CURAM_DIR% is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

Saving your progress configuration files

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the `extractdata` build target.
2. From the %CURAM_DIR%\EJBServer\build\dataextractor directory, copy the following DMX files.

File name	Description
PROGRESSADMIN.dmx	This entity stores progress values which will be selectable by a user when recording progress for a client.
APPRESOURCE.dmx	This entity contains application resource files.
LOCALIZABLETEXT.dmx	This entity holds a link to text translations for descriptions that appear throughout the application.
TEXTTRANSLATION.dmx	This entity holds the text translation for various locales.

Note: %CURAM_DIR% is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

3. Inside the file `APPRESOURCE.dmx`, you must find the attribute entry where `name` has a value of the resource name that was specified during configuration.
4. Search for the file that is specified for the attribute `content` in the `blob` folder and change it to be the name of the resource that was specified during configuration.
5. Update the reference inside `APPRESOURCE.dmx` to point to this modified file name.
6. Update the relative path of the `content` attribute to point to `./COMPONENT_NAME/data/initial/blob`.
7. From %CURAM_DIR%\EJBServer, run **build database**.
8. Save your configuration files.

Progress configuration files for Independent Living

The Independent Living progress configuration files are in the following location in the accelerator.

Table 29: DMX files

File name	Location
<i>PROGRESSADMIN.dmx</i>	<i>%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial</i>

Note: *%CURAM_DIR%* is the Cúram installation directory, which by default is *C:\Merative\Curam\Development*.

Saving your outcome plan configuration files

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the *extractdata* build target.
2. From the *%CURAM_DIR%\EJBServer\build\dataextractor* directory, copy the following DMX files.

File name	Description
<i>OUTCOMEPLANADMIN.dmx</i>	A type of outcome plan that can be created by an organization which aims to achieve better outcomes for clients.
<i>APPROVALREQUEST.dmx</i>	An approval request record is written to the system if an 'Agreement Approval Check' percentage is specified.
<i>LOCALIZABLETEXT.dmx</i>	This entity holds a link to text translations for descriptions that appear throughout the application.
<i>TEXTTRANSLATION.dmx</i>	This entity holds the text translation for various locales.

Note: *%CURAM_DIR%* is the Cúram installation directory, which by default is *C:\Merative\Curam\Development*.

3. From *%CURAM_DIR%\EJBServer*, run **build database**.
4. Save your configuration files.

Outcome plan configuration files for Independent Living

The Independent Living outcome plan configuration files are in the following location in the accelerator.

Table 30: DMX files

File name	Location
<i>PROGRESSADMIN.dmx</i>	<i>%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial</i>

Note: *%CURAM_DIR%* is the Cúram installation directory, which by default is *C:\Merative\Curam\Development*.

Saving your outcome plan goal association configuration files

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the *extractdata* build target.
2. From the `%CURAM_DIR%\EJBServer\build\dataextractor` directory, copy the following DMX files.

File name	Description
<code>OUTCOMEPLANGOALADMINLIN</code>	This entity stores a link between a goal and an outcome plan.

Note: `%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

3. From `%CURAM_DIR%\EJBServer`, run **build database**.
4. Save your configuration files.

Outcome plan goal association configuration files for Independent Living

The Independent Living outcome plan goal association configuration files are in the following location in the accelerator.

Table 31: DMX files

File name	Location
<code>OUTCOMEPLANGOALADMINLIN</code>	<code>%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial</code>

Note: `%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

Setting up CDA for an assessment

For assessments that use Cúram Decision Assist (CDA) to determine the assessment results, you must set up CDA before you configure that assessment.

Configuring CDA assessments

You must define what information to collect, how it is stored, and how the information is acted on to produce the assessment results.

Creating questionnaires

You must configure each of the questions that you want to ask, and set up the data store to capture the responses.

Creating a questionnaire

Complete the following steps to create a questionnaire.

Procedure

1. Select the **Administration Workspace** tab, expand the **Shortcuts** menu, and select **Decision Assist > New Questionnaire**.
2. From the **New Questionnaire** window, enter the following details to create a questionnaire.

Name	Description
Name	The name of the questionnaire. Note: Do not specify an apostrophe in the name of the questionnaire as it is not supported.
Type	Select the type of questionnaire from the list. The list of types are stored in the <i>CT_DAQuestionnaireType.ctx</i> code table.
Comments	Enter any relevant comments.

3. Click Save.

Questionnaire values specific for Independent Living

Specify the following values for configuring a questionnaire for Independent Living.

Name	Value
Name	Needs Assessment
Type	Needs
Comments	blank

Configuring a data store

You must have an appropriate data store schema to add data to the data store for IEG scripts that capture information for outcome management assessments. The data store schema must include all of the required domain types and attributes. Complete the following steps to create a data store schema.

About this task

You must include a minimum of two entities, the Application (parent entity) and Person (child entity). You can include existing domain definitions so that the domain types can be used for creating new attributes. In the example in the procedure, the Application entity incorporates the Person entity.

Procedure

1. From the questionnaire tab, select **ACTIONS** and click **Edit Question Script**. In the **Edit Question Script** tab that is displayed, the IEG Editor starts. By default, the **IEG Editor** tab is displayed in the IEG Editor.
2. Click the **Datastore Editor** tab to create a new data store schema.
3. Select the **Includes** section and click **Include Schema**.
4. From the **Add Include** window, select *IEGDomains* from the drop-down list and click **OK**.
5. From the **Entities** section, click **Add Entity** and enter the following details.

Name	Description	Example Value
Name	The name of the parent entity.	Application

6. Click **Add Entity** to create a second entity and enter the following details.

Name	Description	Example Value
Name	The name of the child entity	Person
Key Attribute	The primary key attribute.	personID

7. From the **Person** entity, click **Add Attribute** to create the following attributes.

Table 32:

Name	Description	Example Value
Name	The name of the attribute in the data store schema.	personID
Domain Type	The name of the domain definitions.	SVR_KEY

8. Repeat step 5 to add more attributes to the entity.
9. From the **Application** entity, click **Add Child Entity**.
10. From the **Add Child Entity** window, select *Person* from the drop-down list and click **OK**.
11. Select **File > Validate Schema** to validate the schema.
12. Select **File > Save Schema** to save the schema.

Data stores values for Independent Living

Specify the following values for configuring new data store entities and attributes for Independent Living.

Table 33: Parent entity values

Name	Value
Name	Application

Table 34: Child entity values

Name	Value
Name	Person
Key Attribute	personID

Table 35: Child entity attribute values

Name	Domain Type
personID	SVR_KEY
firstName	IEG_STRING
gender	IEG_GENDER
dateOfBirth	IEG_DATE
roleID	IEG_INT64
participantID	IEG_INT64
questionsApplicableInd	IEG_BOOLEAN
hasCleanTidyHome	IEG_YES_NO
sufferFromPressureSores	IEG_YES_NO
canManageFinances	IEG_YES_NO

Name	Domain Type
placeIndividualOrOthersAtRisk	IEG_YES_NO
displayDangerousBehaviourToOthers	IEG_YES_NO
canWashSelf	IEG_YES_NO
canFeedSelf	IEG_YES_NO
canGetMedicineFoodHouseholdItems	IEG_YES_NO
requiresAssistanceToToilet	IEG_YES_NO
canWalkLongDistances	IEG_YES_NO

Configuring a question script

You must configure a question script through the IEG editor to define the content and the presentation of the questions in your questionnaire.

Configuring the question script properties

Complete the following steps for configuring the script properties.

Procedure

1. From the **Edit Question Script** window, **IEG Editor** tab, click **Edit > Configure Script Properties**.
2. From the **Configure Script Properties** window, enter the following details.

Name	Description
Quit Page	The identifier of the UIM page to which the user is taken to when they click Save and Exit at any stage within this script.
Finish Page	The identifier of the UIM page to which the user is taken to when no more pages are left to display in the script. That is, when the user clicks Next on the last page in the script.
Config Properties	You can specify a properties file to use for modifying the text and style that is used for various components in the IEG Player.
Show Progress Bar	When set to true, the progress bar is displayed at the top of the page. If not specified, this attribute is set to true by default.
Show Sections	When set to true, the sections panel is displayed on the left side of the page. If not specified, this attribute is set to true by default.
Validate Save & Exit	When set to false, the page validations and mandatory validations are not performed when the Save and Exit button is selected. If not specified, this attribute is set to true by default.

Name	Description
Highlight Validation	<p>When set to true, the mandatory or domain validation errors that are displayed at the top are also repeated next to the failing question.</p> <p>If not specified, the value is taken from the script configuration properties (that uses the key <code>validation.highlight</code>), and if not present, it defaults to false.</p> <p>If two questions on the page have the same label (not recommended) and one of questions failed the validation, both questions are highlighted.</p>
Fast-Path	<p>When set to true, the Fast Path navigation is turned on for all script elements on which it applies. If not specified, this attribute is set to false by default.</p>
Hide Control Question	<p>When set to true, the label and value of questions that control for loops are hidden once the loop it controls is entered. If not specified, it defaults to false and the question value is read-only.</p>

3. Click **OK**.

Script properties values for Independent Living

Specify the following values for configuring the script properties for Independent Living.

Name	Value
Quit Page	AssessmentScript_exit
Finish Page	AssessmentDelivery_executeAssessment
Config Properties	ILDA_ieg-config
Show Progress Bar	True
Show Sections	True
Validate Save & Exit	True
Highlight Validation	False
Fast-Path	False
Hide Control Question	False

Configuring a section

You can configure sections to group related pages together in a logical flow. Sections can also help to indicate progress through a script. Both the section and the question page can have a title and the question page can optionally have a description. Complete the following steps for configuring a section.

Procedure

1. From the **Edit Question Script** window, **IEG Editor** tab, click **New Section**.
2. From the **Section Properties** tab, enter the following details.

Table 36: New section properties

Name	Description
Title	The localizable name of the section title.

Name	Description
Title ID	The identifier is used to reference a text property in the appropriate locale-specific properties file.
Enabled	A reference to the image to use for a section when it is enabled. If not specified, a default image is used instead.
Disabled	A reference to the image to use for a section when it is disabled. If not specified, a default image is used instead.
Selected	A reference to the image to use for a section when it is the current highlighted section. If not specified, a default image is used instead.

3. Select **File > Validate** to validate the script and make sure that there are no errors.
4. Select **File > Save Script** to save the IEG script.

Section values for Independent Living

Specify the following values for creating the 3 sections that are created for Independent Living.

Table 37: Health and Safety section properties

Name	Value
Title	Health and Safety
Title ID	Section.TitleHealthAndSafety
Enabled	NeedsAssessment_health.png
Disabled	NeedsAssessment_health_disabled.png
Selected	NeedsAssessment_health.png

Table 38: Daily Routine section properties

Name	Value
Title	Daily Routine
Title ID	Section.TitleDailyRoutine
Enabled	NeedsAssessment_routine.png
Disabled	NeedsAssessment_routine_disabled.png
Selected	NeedsAssessment_routine.png

Table 39: Summary section properties

Name	Value
Title	Summary
Title ID	Section.TitleSummary
Enabled	NeedsAssessment_summary.png
Disabled	NeedsAssessment_summary_disabled.png
Selected	NeedsAssessment_summary.png

Configuring a page

When a section is created, a page is automatically created for you. You must configure a question page to present the questions. A page can contain many clusters to logically group questions on the page. Complete the following steps for configuring a page.

About this task

You can define the structure of your questions in a logical grouping so that answers to the questions can be captured effectively.

Procedure

1. Expand the section, select **New Page**. A page is automatically created as part of the new section creation.
2. From the **Question Page Properties** tab, enter the following details.

Name	Description
Page ID	The unique identifier for the page. The identifier can be used to reference the page when you link to it from another part of the script. Or when you indicate what page to start at when reentering a script.
Entity	<p>The name of an entity from the associated data store schema. If used directly within a section, the entity that is referenced on a page must be a child of the root element within the schema. Any attribute within a cluster on the page, which does not have its own entity that is specified is assumed to be an attribute of this entity.</p> <p>When a page is used within a loop, there is no need to set the entity on the page. It is only if it is the same as the entity used for the loop itself.</p>
Page.Title	The title element is used to define the localizable text.
Page Title ID	Each title element has an identifier, which is used to reference a text property in the appropriate locale-specific properties file.
Page Description	The description element can be used to add a description to any titled element within a script. The description element has an ID attribute, which is used to reference a text property in the appropriate locale-specific properties file.
Page Description ID	<p>An identifier for the description text, which is used as a key with which to reference the text within the associated properties file. The identifier must be unique within the content in which it is used.</p> <p>For example, if the description is added to a cluster, then the identifier only needs to be unique within the page in which the cluster is contained. Another page can contain an identifier with the same value.</p>
Set Focus	When set to false, the attribute indicates to the IEG Player that no initial focus is set on the form. If not specified, the attribute is set to true by default.

3. Select **File > Validate** to validate the script and make sure that there are no errors.
4. Select **File > Save Script** to save the IEG script.

Question page values for Independent Living

Specify the following question pages for the associated sections that are created for Independent Living.

Table 40: Health and Safety question page properties

The following values are specific for the page, which is created for the Health and Safety section.

Name	Value
Page ID	HealthAndSafetyPage
Entity	Person
Page.Title	Health and Safety
Page Title ID	Group1.Title
Page Description	These questions are related to health and safety and whether the client's state of health compromises their standard of living.
Page Description ID	Group1.Description
Set Focus	True

Table 41: Daily Routine question page properties

The following values are specific for the page, which is created for the Daily Routine section.

Name	Value
Page ID	DailyRoutinePage
Entity	Person
Page.Title	Daily Routine
Page Title ID	Group2.Title
Page Description	These questions are related to daily routine and whether the client requires help performing everyday tasks.
Page Description ID	Group2.Description
Set Focus	True
Progress	50

Configuring a summary page

You can configure a summary page to display the list of the clients answers in read-only for the questions asked. The summary page is the last page displayed.

Procedure

1. Expand the summary section, you can delete the default page created for the section.
2. Right-click on the summary section and select **Add Summary Page**.
3. From the **New Summary Page**, select the **Question Page Properties** tab, enter the following details.

Name	Description
Page ID	The unique identifier for the page. The identifier can be used to reference the page when you link to it from another part of the script. Or when you indicate what page to start at when reentering a script.
Entity	<p>The name of an entity from the associated data store schema. If used directly within a section, the entity that is referenced on a page must be a child of the root element within the schema. Any attribute within a cluster on the page, which does not have its own entity that is specified is assumed to be an attribute of this entity.</p> <p>When a page is used within a loop, there is no need to set the entity on the page. It is only if it is the same as the entity used for the loop itself.</p>
Page.Title	The title element is used to define the localizable text.
Page Title ID	Each title element has an identifier, which is used to reference a text property in the appropriate locale-specific properties file.
Page Description	The description element can be used to add a description to any titled element within a script. The description element has an ID attribute, which is used to reference a text property in the appropriate locale-specific properties file.
Page Description ID	<p>An identifier for the description text, which is used as a key with which to reference the text within the associated properties file. The identifier must be unique within the content in which it is used.</p> <p>For example, if the description is added to a cluster, then the identifier only needs to be unique within the page in which the cluster is contained. Another page can contain an identifier with the same value.</p>
Set Focus	When set to false, the attribute indicates to the IEG Player that no initial focus is set on the form. If not specified, the attribute is set to true by default.

4. Select **File > Validate** to validate the script and make sure that there are no errors.

5. Select **File > Save Script** to save the IEG script.

Summary page values for Independent Living

Specify the following summary page for the associated summary section that is created for Independent Living.

Table 42: Summary page properties

The following values are specific for the page, which is created for the Summary section.

Name	Value
Page ID	SummaryPage
Page.Title	Summary

Name	Value
Page Title ID	Summary.Title
Set Focus	True
Progress	100

Configuring a cluster

You must configure a cluster before you can add questions to a page. Clusters help to control the layout of the questions on the page. You can add multiple clusters to logically group questions on the page. Clusters might also contain a title and a description. Complete the following steps for configuring a cluster.

Procedure

1. For the section, from the right-hand navigation toolbar, select the **Add Cluster** icon and drag under the section description.
2. Select the **Cluster Title** arrow to display the **Cluster Properties** tab.
3. From the **Cluster Properties** tab, enter the following details.

Name	Description
Cluster Title	The title element is used to define the localizable text.
Cluster Title ID	Each title element has an identifier, which is used to reference a text property in the appropriate locale-specific properties file.

4. Select **File > Validate** to validate the script and make sure that there are no errors.
5. Select **File > Save Script** to save the IEG script.

Cluster values for Independent Living

Specify the following clusters on the associated pages that are configured for Independent Living.

Table 43: Health and Safety cluster values

The following values are specific for the cluster, which is created for the **Health and Safety** page.

Name	Value
Cluster Title	Health and Safety
Cluster Title ID	Group1.Title

Table 44: Daily Routine cluster values

The following values are specific for the cluster, which is created for the **Daily Routine** page.

Name	Value
Cluster Title	Daily Routine
Cluster Title ID	Group2.Title

Table 45: Summary cluster 1 values

The following values are specific for the first cluster, which is created for the **Summary** page.

Name	Value
Cluster Title	Health and Safety
Cluster Title ID	Group1.Title
Cluster Entity	Person

Table 46: Summary cluster 2 values

The following values are specific for the second cluster, which is created for the **Summary** page.

Name	Value
Cluster Title	Daily Routine
Cluster Title ID	Group2.Title
Cluster Entity	Person

Configuring a question

Questions must be given an identifier, which must correspond to one of the attributes of the entity type the page is mapped to. Complete the following steps for configuring a question.

About this task

Any data to be stored in the data store must be associated with an attribute of an entity in the data store schema to be used with this script. If all the questions on a page relate to the same entity, the page can be mapped to that entity type. For example, the page can be mapped to the Person entity.

Procedure

1. For the cluster, from the right-hand navigation toolbar, select the **Add Question** icon and drag in to the cluster.
2. Select the **New Question** to open the **Question Properties** tab.
3. From the **Question Properties** tab, enter the following details.

Name	Description
Question Attribute	<p>The identifier of a question refers to the name of the attribute that is used to store the answer to the question within the data store. The entity to which the attribute belongs is taken from the cluster, which contains the question or the page that contains the cluster.</p> <p>For example, if the question is contained within a cluster on a page, which has the entity Address that is specified for the cluster and Person that is specified for the page. The ID of the question is 'firstName', then the answer to the question is stored in Address.firstName. If the cluster had no entity that is specified, the answer to the question is stored in Person.firstName.</p>
Mandatory	<p>Specifies whether you must provide an answer to a question. If set to true, the asterisk is placed beside the question to indicate that it is mandatory. Validations are performed when the user clicks the Next button to ensure that an answer is provided for the question.</p>

Name	Description
Question Label	The label element is used to define the label text for any question or answer within a script. Each label element has an ID, which is used to reference a text property in the appropriate local-specific properties file.
Question Label ID	An identifier for the label text, which is used as the key with which to reference the text within the associated properties file. The ID must be unique within the page in which it is used.
Question Help Text	The help-text element is used to specify the help text for a cluster, specify the help text for a question within a script or specify the help text for row level help for lists. Help text can be displayed in two ways for clusters, at a cluster level and at a question level. When you run an IEG script, the help text for each question within a cluster is combined with the overall help text for the cluster itself to create a help panel within the cluster. Help can also be displayed at the question level, in this case a help icon is displayed alongside a question.
Question Help Text ID	The identifier of a question refers to the name of the attribute that is used to store the answer to the question within the data store.

4. Select **File > Validate** to validate the script and make sure that there are no errors.
5. Select **File > Save Script** to save the IEG script.

Question values for Independent Living

Specify the following questions inside the clusters that are created for each section that is configured for Independent Living. The help text for each question is displayed at the cluster level within a cluster. The help text is combined for all the questions with the overall help text for the cluster itself to create a help panel within the cluster.

Table 47: Health and Safety cluster question values

The following values are specific for the 5 questions, which are created for the **Health and Safety** cluster on the **Health and Safety** page.

Question Attribute	Mandatory	Question Label	Question Label ID	Question Help Text	Question Help Text ID
hasCleanTidyHome	True	Is the home clean and tidy?	Q1.Label	Is the home tidy and are kitchen utensils clean?	Q1.HelpText

Question Attribute	Mandatory	Question Label	Question Label ID	Question Help Text	Question Help Text ID
sufferFromPressureSores	True	Does the client suffer from pressure sores?	Q2.Label	Pressure sores are areas of damaged skin that is caused by staying in one position for too long. You are at risk if you are bedridden, use a wheelchair, or are unable to change your position.	Q2.HelpText
canManageFinancials	True	Is the client able to manage their own financial affairs?	Q3.Label	Can the client manage paying bills, look after their money and budget?	Q3.HelpText
placeIndividualOrOthersAtRisk	True	Does the client's lifestyle place them or others at risk?	Q4.Label	An example might be where client drives a car but has poor vision.	Q4.HelpText
displayDangerousBehaviourToOthers	True	Does the client display dangerous behavior towards others?	Q5.Label	Client threatens people or is verbally abusive.	Q5.HelpText

Table 48: Daily Routine cluster question values

The following values are specific for the 5 questions, which are created for the **Daily Routine** cluster on the **Daily Routine** page.

Question Attribute	Mandatory	Question Label	Question Label ID	Question Help Text	Question Help Text ID
canWashSelf	True	Can the client wash themselves?	Q6.Label	Is the client capable of taking a bath or shower without assistance?	Q6.HelpText
canFeedSelf	True	Can the client feed themselves?	Q7.Label	Is the client capable of feeding themselves or do they require assistance?	Q7.HelpText

Question Attribute	Mandatory	Question Label	Question Label ID	Question Help Text	Question Help Text ID
canGetMedicineFoodHouseholdItems	True	Can the client obtain food, medicines, and household items?	Q8.Label	Is the client capable of doing their own shopping? This includes preparing shopping lists, getting to and from the shops, and managing money.	Q8.HelpText
requiresAssistanceToilet	True	Can the client access the toilet without assistance?	Q9.Label	Is the client capable of going to and from, and using, the toilet without assistance?	Q9.HelpText
canWalkLongDistances	True	Can the client walk long distances without assistance?	Q10.Label	Client cannot walk long distances without tiring quickly.	Q10.HelpText

Table 49: Summary cluster 1 question values

The following values are specific for the 5 questions, which are created for the first **Summary** cluster on the **Summary** page.

Question Attribute	Mandatory	Question Label	Question Label ID	Question Help Text	Question Help Text ID
hasCleanTidyHome	True	Is the home clean and tidy?	Q1.Label	Is the home tidy and are kitchen utensils clean?	Q1.HelpText
sufferFromPressureSores	True	Does the client suffer from pressure sores?	Q2.Label	Pressure sores are areas of damaged skin that is caused by staying in one position for too long. You are at risk if you are bedridden, use a wheelchair, or are unable to change your position.	Q2.HelpText
canManageFinancials	True	Is the client able to manage their own financial affairs?	Q3.Label	Can the client manage paying bills, look after their money and budget?	Q3.HelpText

Question Attribute	Mandatory	Question Label	Question Label ID	Question Help Text	Question Help Text ID
placeIndividualOrOthersAtRisk	True	Does the client's lifestyle place them or others at risk?	Q4.Label	An example might be where client drives a car but has poor vision.	Q4.HelpText
displayDangerousBehaviourToOthers	True	Does the client display dangerous behavior towards others?	Q5.Label	Client threatens people or is verbally abusive.	Q5.HelpText

Table 50: Summary cluster 2 question values

The following values are specific for the 5 questions, which are created for the second **Summary** cluster on the **Summary** page.

Question Attribute	Mandatory	Question Label	Question Label ID	Question Help Text	Question Help Text ID
canWashSelf	True	Can the client wash themselves?	Q6.Label	Is the client capable of taking a bath or shower without assistance?	Q6.HelpText
canFeedSelf	True	Can the client feed themselves?	Q7.Label	Is the client capable of feeding themselves or do they require assistance?	Q7.HelpText
canGetMedicineFoodHouseholdItems	True	Can the client obtain food, medicines, and household items?	Q8.Label	Is the client capable of doing their own shopping? This includes preparing shopping lists, getting to and from the shops, and managing money.	Q8.HelpText
requiresAssistanceToToilet	True	Can the client access the toilet without assistance?	Q9.Label	Is the client capable of going to and from, and using, the toilet without assistance?	Q9.HelpText
canWalkLongDistances	True	Can the client walk long distances without assistance?	Q10.Label	Client cannot walk long distances without tiring quickly.	Q10.HelpText

Configuring the cluster layout of the assessment

You can configure a cluster layout where you have a high degree of control over what is presented to the user, with the goal of presenting a friendly, intuitive user interface. Complete the following steps for configuring the cluster layout for your IEG script.

About this task

The default appearance of a cluster is to display all the questions it contains in one column. The questions are displayed in the order in which they are defined in the script. The label and input field or value each taking 50% of the available width. To change the default appearance, a layout element can be added to the cluster.

Procedure

1. For the cluster, from the **Cluster Properties** tab, select the **Layout Properties** section.
2. From the **Layout Properties** window, select the following details to configure cluster width and alignment.

Name	Description
Layout Type	<p>The type element is used within a layout element for a cluster to control the layout of labels in relation to input controls. You can select on of the following types:</p> <ul style="list-style-type: none"> • flow - A cluster that uses this layout displays the questions from left to right, top to bottom, with the labels always appearing to the left of the input control or value. • compact-flow - The compact-flow behaves in much the same way but with the label displayed above the input control or value. You can fit more columns into a cluster than if the labels and input controls were side-by-side.
Num Cols	<p>The num-cols element is used within a layout element for a cluster to control the number of columns within that cluster. Each column consists of both labels and input controls or values for each question. The default number of elements to display in a column is 1.</p>
Label Width	<p>You can alter the label width by altering the percentage of the available column that is given to the label of a question from its default of 50%.</p>
Label Alignment	<p>The label-alignment element is used within a layout element for a cluster to control the alignments for the text within all the labels for that cluster. You can select one of the following label-alignment options:</p> <ul style="list-style-type: none"> • right - to align the text to the right within the space that is allocated to the label (the default). • left - to align the text to the left within the space that is allocated to the label. • center - to align the text to the center within the space that is allocated to the label.

Name	Description
Cluster Width	You can alter the width of the cluster by altering the percentage of the available width of the page, which the cluster uses from its default of 100%.

3. Select **File > Validate** to validate the script and make sure that there are no errors.
4. Select **File > Save Script** to save the IEG script.

Cluster layout values for Independent Living

Specify the following values for configuring the cluster layout for the needs assessment IEG script for Independent Living.

Table 51: Cluster layout values

Name	Value
Layout Type	flow
Num Cols	blank
Label Width	70
Label Alignment	right
Cluster Width	blank

Releasing a questionnaire

You must release your questionnaire to make it available for selection. Complete the following steps to release a questionnaire.

Procedure

1. Select the **Administration Workspace** tab, expand the **Shortcuts** menu, and select **Decision Assist**.
2. From the list of questionnaires, select the questionnaire that you want to release. A new tab opens for the selected questionnaire.
3. Select **ACTIONS > Release > Yes**.

Updating a released questionnaire

To modify a questionnaire after it is released, you must create a new version of the questionnaire.

Procedure

1. Select the **Administration Workspace** tab, expand the **Shortcuts** menu, select **Decision Assist**.
2. From the list of **Questionnaires**, select the questionnaire that you want to release which opens up in a new tab.
3. Select **ACTIONS > New Version > Yes**.

Configuring an assessment matrix

You must configure assessment rules in a CDA matrix to determine the logic for each outcome that you need.

Configuring an assessment matrix outcome

An assessment matrix outcome is a result that can be obtained from a particular decision matrix. The combination of outcome and decision matrix type, and score where appropriate, are what

constitutes a determination result. Complete the following steps for configuring an outcome for an assessment matrix.

Procedure

1. Select the **Administration Workspace** tab, expand the **Shortcuts** menu, select **Decision Assist > New Outcome**.
2. From the **New Outcome** window, enter the following details.

Name	Description
Name	The name of the outcome.
Type	The type of the outcome, which is specified in the <i>CT_DAOOutcomeType.ctx</i> code table.
Start Date	The start date of the outcome.
End Date	The end date of the outcome.
Comments	Comments relating to the outcome.

3. Click **Save**.

Outcome values for the needs assessment matrix for Independent Living

Specify the following values for configuring an outcome for the needs assessment matrix for Independent Living.

Table 52: Daily Routine outcome values

Name	Value
Name	Daily Routine
Type	Needs
Start Date	3/1/2015
End Date	blank
Comments	blank

Table 53: Health and Safety outcome values

Name	Value
Name	Health and Safety
Type	Needs
Start Date	4/1/2015
End Date	blank
Comments	blank

Creating a CDA assessment configuration

You must create a CDA assessment configuration to associate the assessment questionnaire with an assessment type. Complete the following steps for configuring the questionnaire association with the assessment configurations.

Procedure

1. Select the **Administration Workspace** tab, expand the **Shortcuts** menu, select **Outcome Management > CDA Assessment Configurations > New**.
2. From the **New CDA Assessment Configuration** window, enter the following details.

Name	Description
Name	The name of the assessment configuration. The assessment configurations are selected as part of the creation of an assessment definition.
Question Script	You must preconfigure a question script in order for the question script to be available for selection in this drop-down list. Only released question scripts are available for selection.

3. Click **Save**.

Assessment configuration values for Independent Living

Specify the following assessment configuration values for Independent Living.

Table 54: CDA assessment configuration values

Name	Value
Name	Needs Assessment Config
Question Script	Needs Assessment Questionnaire

Configuring a CDA matrix

You can define the rules to determine a particular outcome when the assessment is run. Complete the following for configuring a decision matrix.

Procedure

1. From the created CDA assessment configurations, select the action icon and click **Add Decision Matrix**.
2. From the **Add Decision Matrix** window, enter the following details for creating a new decision matrix.

Name	Description
Name	The name of the Decision Matrix Version.
Type	The type of the Decision Matrix Version. The types are configured in the <i>CT_DADecisionMatrixType.ctx</i> code table.
Scoring By Outcome	The indicator to determine whether the matrix is needed to produce a score for the answers that are used to reach each outcome.
Multiple Outcomes	The indicator to determine whether the matrix can produce multiple outcomes.

Name	Description
Comments	The comments that are entered by the user.

3. Click **Save**.

CDA matrix values for Independent Living

Complete the following values for configuring a CDA matrix for Independent Living.

Name	Value
Name	Needs Assessment Matrix
Type	Needs
Scoring By Outcome	Yes
Multiple Outcomes	Yes
Comments	blank

Editing the CDA matrix

You must edit the decision assist matrix to define the logic that is applied to assessment response. The questions in the question script are available for selection. The questions are displayed in the decision matrix editor, which was pre-configured in the question script.

Procedure

1. From the created CDA assessment configurations, select the decision matrix link to open the CDA matrix tab.
2. From the CDA matrix tab, select the action icon and click **Edit Matrix** to open the editor.
3. From the **Create Matrix** window, for the **Add Questions** step, select the check box for the questions you wish to include and click **Next**.
4. From the **Add Outcomes** step, select the check box for the outcome you wish to include and click **Next**.
5. From the **Add Options** step, select the options that you wish to include and click **Create Matrix**.
6. Click **Save**.

Matrix values for Independent Living

Specify the following values to be configured a new matrix for Independent Living.

Table 55: Question selected

Select all 10 questions to be included in the CDA matrix.

Questions
Is the home clean and tidy?
Does the client suffer from pressure sores?
Is the client able to manage their own financial affairs?
Does the client's lifestyle place them or others at risk?
Does the client display dangerous behavior towards others?
Can the client wash themselves?
Can the client feed themselves?
Can the client obtain food, medicines, and household items?

Questions
Can the client access the toilet without assistance?
Can the client walk long distances without assistance?

Table 56: Outcomes selected

Select the following outcome to be included in the CDA matrix.

Outcomes
Health and Safety
Daily Routine

Table 57: Options selected

Select the following option to be included in the CDA matrix.

Options
Scores

Configuring the scores and outcome combinations for the CDA matrix

For each question in the CDA matrix, complete the following steps to configure the scores and outcome combinations.

Procedure

1. From the decision matrix editor, enter a score value for each of the questions in the **Scores** column.
2. From each of the outcomes column, select the down arrow and click **Add Combination**.
3. From the combination column, enter the outcome combinations for each possible answer for each question that is specified for each outcome.
4. Click **Validate** to validate the matrix.
5. Click **Save** to save the matrix.
6. From the decision matrix tab, select the action icon and click **Release** to release the decision matrix.

Matrix score values for Independent Living

Specify the following scores for the Yes/No answers and the different combinations for each question.

Table 58: Health and Safety questions score values

Question Number	Question	Answers	Scores
Q1	Is the home clean and tidy?	Yes	0
		No	1
Q2	Does the client suffer from pressure sores?	Yes	2
		No	0
Q3	Is the client able to manage their own financial affairs?	Yes	0
		No	4

Question Number	Question	Answers	Scores
Q4	Does the client's lifestyle place them or others at risk?	Yes	8
		No	0
Q5	Does the client display dangerous behavior towards others?	Yes	16
		No	0

Table 59: Daily Routine questions score values

Question Number	Question	Answers	Scores
Q6	Can the client wash themselves?	Yes	0
		No	1
Q7	Can the client feed themselves?	Yes	0
		No	2
Q8	Can the client obtain food, medicines, and household items?	Yes	0
		No	4
Q9	Can the client access the toilet without assistance?	Yes	0
		No	8
Q10	Can the client walk long distances without assistance?	Yes	0
		No	16

Table 60: Health and Safety questions answer combination (C) values

Question Number	Answers	C1	C2	C3	C4	C5	C6	C7	C8	C9	C10	C11	C12	C13	C14	C15	C16	C17	C18	C19	C20	C21	C22	C23	C24	C25	C26	C27	C28	C29	C30	C31	C32
Q1	Yes	True																															
	No																																
Q2	Yes	True																															
	No							True																									
Q3	Yes	True																															
	No				True																												
Q4	Yes	True																															
	No	True																															
Q5	Yes	True																															
	No	True																															

Table 61: Daily Routine questions answer combination (C) values

Question Number	Answers	C1	C2	C3	C4	C5	C6	C7	C8	C9	C10	C11	C12	C13	C14	C15	C16	C17	C18	C19	C20	C21	C22	C23	C24	C25	C26	C27	C28	C29	C30	C31	C32
Q6	Yes	True																															
	No																																
Q7	Yes	True																															
	No																																

Saving your questionnaire configuration files

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the *extractdata* build target.
2. From the `%CURAM_DIR%\EJBServer\build\dataextractor` directory, copy the following DMX files.

File name	Description
<code>QUESTIONNAIRE.dmx</code>	This entity holds details of questionnaires, the answers to which help decide how to determine a client's needs.
<code>QUESTIONNAIREVERSION.dmx</code>	This entity holds details of a questionnaire version. There can be multiple versions of a questionnaire over time, as questions can be added / removed from the questionnaire.

Note: `%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

3. Update the files so that they only contain the new configurations.
4. From `%CURAM_DIR%\EJBServer`, run **build database**.
5. Save your configuration files.

Questionnaire configuration files for Independent Living

The Independent Living questionnaire configuration files are in the following location in the accelerator.

Table 63: DMX files

File name	Location
<code>QUESTIONNAIRE.dmx</code>	<code>%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial</code>
<code>QUESTIONNAIREVERSION.dmx</code>	

Note: `%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

Saving your data store configuration files

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the *extractdata* build target.
2. From the `%CURAM_DIR%\EJBServer\build\dataextractor` directory, copy the following DMX files.

File name	Description
<code>DATASTORESCHEMA.dmx</code>	This entity holds the schema document that defines the structure of a data store.

Note: %CURAM_DIR% is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

3. Inside the file `DATASTORESCHEMA.dmx`, you must find the attribute entry where `schemaName="NeedsAssessmentV1"`.
4. Search for the file that is specified for the attribute `schemaText` in the `clob` folder and change it to `NeedsAssessmentV1.xsd`.
5. Update the reference inside `DATASTORESCHEMA.dmx` to point to this modified file name.
6. Update the relative path of the `schemaText` file to point to `./COMPONENT_NAME/data/initial/clob`.
7. From %CURAM_DIR%\EJBServer, run **build database**.
8. Save your configuration files.

Data store configuration files for Independent Living

The Independent Living data store configuration files are in the following location in the accelerator.

Table 64: DMX files

File name	Location
<code>DATASTORESCHEMA.dmx</code>	<code>%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial</code>

Note: %CURAM_DIR% is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

Table 65: Clob files

File name	Location
<code>NeedsAssessmentV1.xsd</code>	<code>%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial\clob</code>

Saving your question script configuration files

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the `extractdata` build target.
2. From the %CURAM_DIR%\EJBServer\build\dataextractor directory, copy the following DMX files.

File name	Description
<code>IEGSCRIPTINFO.dmx</code>	This entity stores the IEG script definitions.
<code>APPRESOURCE.dmx</code>	This entity stores the application resources, such as properties and image files.
<code>QUESTION.dmx</code>	This entity stores the details of the questions that are associated with the questionnaire.

Note: %CURAM_DIR% is the Cúram installation directory, which by default is C:\Merative\Curam\Development.

3. Inside the file *IEGSCRIPTINFO.dmx*, you must find the attribute entry where *scriptID="NeedsAssessmentVI"*.
4. Search for the file that is specified for the attribute *scriptDefinition* in the *clob* folder and change it to *NeedsAssessmentVI.xml*.
5. Update the reference inside *IEGSCRIPTINFO.dmx* to point to this modified file name.
6. Update the relative path of the *scriptDefinition* attribute to point to *./COMPONENT_NAME/data/initial/clob*.
7. Inside the file *APPRESOURCE.dmx*, you must find the attribute entry where *name* has a value that starts with *NeedsAssessmentVI*.
8. Search for the file that is specified for the attribute *content* in the *clob* folder and change it to be the same as the *name*. Add a *.properties* extension to the file.
9. Update the reference inside *APPRESOURCE.dmx* to point to this modified file name.
10. Update the relative path of the *scriptDefinition* attribute to point to *./COMPONENT_NAME/data/initial/clob*.
11. From %CURAM_DIR%\EJBServer, run **build database**.
12. Save your configuration files.

Question script configuration files for Independent Living

The Independent Living question script configuration files are in the following location in the accelerator.

Table 66: DMX files

File name	Description	Location
<i>IEGSCRIPTINFO.dmx</i>	This file includes the reference to the <i>NeedsAssessmentV1.xml</i> IEG script file.	%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial
<i>APPRESOURCE.dmx</i>	Includes the reference to multiple image files and IEG script properties files specific to Independent Living.	<p>Note: %CURAM_DIR% is the Cúram installation directory, which by default is C:\Merative\Curam\Development.</p>

Table 67: IEG script files

File name	Description	Location
<i>NeedsAssessmentV1.xml</i>	<p>The script that is written for Independent Living was relatively small, when compared to the large-scale scripts. It contains the following sections:</p> <ul style="list-style-type: none"> • Health and Safety • Daily Routine • Summary <p>There are only 5 questions on each of the Health and Safety and Daily Routine pages.</p>	%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial\clob

File name	Description	Location
<ul style="list-style-type: none"> NeedsAssessmentV1_1_DecisionAssist.properties NeedsAssessmentV1_1_DecisionAssist_HealthAndSafetyPage.properties NeedsAssessmentV1_1_DecisionAssist_DailyRoutinePage.properties NeedsAssessmentV1_1_DecisionAssist_SummaryPage.properties 	<p>These property files specify the text that is displayed for each section and the finish and quit page identifiers are specified.</p>	<ul style="list-style-type: none"> %CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial\blob

Saving your assessment matrix outcome configuration files

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the *extractdata* build target.
2. From the %CURAM_DIR%\EJBServer\build\dataextractor directory, copy the following DMX files.

File name	Description
DAOUTCOME.dmx	The result that can be obtained from a particular decision matrix.

Note: %CURAM_DIR% is the Cúram installation directory, which by default is C:\Merative\Curam\Development.

3. From %CURAM_DIR%\EJBServer, run **build database**.
4. Save your configuration files.

Assessment matrix outcome configuration files for Independent Living

The Independent Living assessment matrix outcome configuration files are in the following location in the accelerator.

Table 68: DMX files

File name	Location
DAOUTCOME.dmx	%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial

Note: %CURAM_DIR% is the Cúram installation directory, which by default is C:\Merative\Curam\Development.

Saving your association between the questionnaire and the assessment configuration

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the *extractdata* build target.
2. From the %CURAM_DIR%\EJBServer\build\dataextractor directory, copy the following DMX files.

File name	Description
DAASSESSMENTCONFIGURATION.dmx	A configuration for a type of assessment that can be executed to assess a client by using a decision matrix.

Note: %CURAM_DIR% is the Cúram installation directory, which by default is C:\Merative\Curam\Development.

3. From %CURAM_DIR%\EJBServer, run **build database**.
4. Save your configuration files.

Association configuration files between a questionnaire and assessment in Independent Living

The configuration files associating a questionnaire with a decision matrix in Independent Living are in the following location in the accelerator.

Table 69: DMX files

File name	Location
DAASSESSMENTCONFIGURATION.DMX	%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial

Note:
%CURAM_DIR% is the Cúram installation directory, which by default is C:\Merative\Curam\Development.

Saving your decision matrix configuration files

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the *extractdata* build target.
2. From the %CURAM_DIR%\EJBServer\build\dataextractor directory, copy the following DMX files.

File name	Description
DECISIONMATRIX.dmx	The decision matrix allows the user to define the rules used to achieve outcomes.
DECISIONMATRIXVERSION.dmx	A decision matrix defines the rules by which a determination configuration can reach a particular outcome.
DMQUESTIONLINK.dmx	This entity stores details of questions that are used in a decision matrix version.
DMOUTCOMELINK.dmx	This entity stores details of the relationship between an outcome and a decision matrix version.

Note: %CURAM_DIR% is the Cúram installation directory, which by default is C:\Merative\Curam\Development.

3. Inside the *DECISIONMATRIXVERSION.dmx* file, search for the file that is specified for the attribute *matrixData* in the *clob* folder.
4. Rename the file in the *clob* folder to *NeedsAssessmentMatrix.xml*.
5. Update the reference inside the *DECISIONMATRIXVERSION.dmx* file to point to this modified file name.
6. Update the relative path of the *matrixData* attribute to point to *./COMPONENT_NAME/data/initial/clob*.
7. From %CURAM_DIR%\EJBServer, run **build database**.
8. Save your configuration files.

Decision matrix configuration files for Independent Living

The decision matrix configuration files for Independent Living are in the following location in the accelerator.

Table 70: DMX files

File name	Location
<i>DECISIONMATRIX.dmx</i>	%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial
<i>DECISIONMATRIXVERSION.dmx</i>	%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial
<i>DMQUESTIONLINK.dmx</i>	Note: %CURAM_DIR% is the Cúram installation directory, which by default is C:\Merative\Curam\Development.
<i>DMOUTCOMELINK.dmx</i>	

Table 71: Clob files

File name	Location
<i>NeedsAssessmentMatrix.xml</i>	%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial\clob

Configuring assessments

Complete the following tasks to configure an assessment to capture data about a client to determine the severity of the client's needs.

Configuring assessments

You must define the assessment through configurations in the administration workspace.

After you define assessments, they are available to run. Running the assessment identifies and determines the severity of the client's needs.

Configuring assessment definitions

You configure an assessment definition to manage and determine how the assessment results are displayed.

Assessment definitions

You must configure an assessment definition to manage the way that the assessment is based and to determine the way the assessment results are displayed.

A number of configuration settings are provided for an assessment definition. These settings allow an administrator to specify how assessments that are based on this assessment definition are managed and how the assessment results are displayed.

The following determine the way assessments that are based on this assessment definition are managed.

- Assessment Interval Days
- Reassessment Warning Days
- Assessment Configuration
- Approval Check Percentage
- Type drop-down list
- Role Change Allowed indicator
- Reassessment Allowed indicator
- Security Identifiers

The remaining configuration options determine the way the assessment results are displayed when a client is assessed.

- Group name field
- Display Graphs indicator
- Graph By drop down list
- Priorities Applicable indicator
- Graph Type drop down list
- Display Guidance indicator
- Group Results By Category indicator
- Display Score Indicator
- Guidance Result Cluster drop down list
- Factor Display Text
- Classification Display Text
- Count Same Score As One Priority

The **Results Page** field allows the default assessment results page to be overridden with a different page if required.

Configuring an assessment definition

An assessment definition is the template on which an individual assessment is based. Complete the following steps to configure an assessment definition.

About this task

You can use assessments to identify the needs of clients and to enable the development of an outcome plan to address those needs. An assessment can be run for a group of clients that results in one result. Or it can be run for one or more clients that results in one result for each client. An assessment can be run by using Cúram Decision Assist (CDA) or Cúram Express Rules (CER) and is defined in the assessment definition configurations.

Procedure

1. Select the **Administration Workspace** tab, expand the **Shortcuts** menu, select **Outcome Management > Assessment Definitions > New**.
2. From the **New Assessment Definition** window, enter the following details to create a new assessment definition.

Name	Description
Name	The localizable name of the assessment definition.
Reference	A reference field so that the assessment definitions can be referenced within code. The reference field is unique across all active assessment definitions.
Start Date	The date that the assessment is effective from.
Reassessment Warning Days	The reassessment warning works with the assessment interval. You can use this to alert the caseworker who ran the last assessment that a reassessment is due. For example, the reassessment warning days might be set to 5 days. In this case, a task can be created 5 days before the reassessment due date and assigned to the caseworker who last ran the assessment.
Assessment Interval Days	The Assessment Interval represents the frequency at which an assessment might be run. It is used to calculate the reassessment due date of an assessment. For example, if an assessment is run on the 01/01/2015 and the Assessment Interval is set to 30, the reassessment due date is 31/01/2015.
Assessment Configuration	The unique identifier of the assessment to run. For example, the CDA or CER assessment identifier.
Type	The type of assessment to run, for example role-based assessments. For the role-based assessments, the questions to be asked of each role while for group-based assessments the questions to be asked for the group.
Group Name	The localizable name of the group to be displayed when the group-based assessments are configured.

Name	Description
Role Change Allowed	<p>Specifies whether the roles defined for the assessment can be changed on reassessment.</p> <p>When role changes are allowed, the Select Clients and Roles page is displayed during reassessment and the caseworker can change the assessment roles.</p> <p>When role changes are not allowed, the Select Clients and Roles page is not displayed during reassessment.</p> <div data-bbox="890 512 1428 661" style="border: 1px solid blue; padding: 5px;"> <p>Note: Role changes are not allowed for reassessment purposes if only one role is defined for the assessment definition and only one client exists on the assessment.</p> </div>
Reassessment Allowed	<p>Reassessment allows a client's progress for specific factors to be measured over time. Reassessment is applicable to some assessments. Certain assessments can be reassessed multiple times. Other assessments are run only once.</p> <p>When the Reassessment Allowed indicator is selected, an option to reassess the assessment is displayed on the assessment home page. This option allows a caseworker to either reassess for all of the factors that are defined for the assessment or reassess for a subset of factors only.</p> <p>If the Reassessment Allowed indicator is not selected, the reassess option is not displayed on the assessment home page and the assessment cannot be reassessed.</p>
Display Graphs	Specify true to display graphs for this assessment definition or false to display a list.
Graph By	If you are displaying graphs for the assessment definition, specify whether the graphs are based on classifications or scores.
Graph Type	Dictates the type of graph to be displayed for this assessment definition. For example, a bar chart or spider graph. It is only applicable in the instance where the display graph indicator is set to true.
Priorities Applicable	Indicates whether priorities apply to the assessment.
Display Guidance	Indicates whether guidance is displayed for this assessment definition. If it is set to true, the guidance is displayed for the assessed factors otherwise no guidance is displayed.
Group Results By Category	Indicates whether the results of an assessment are displayed by category, or by classification. It is only applicable in the instance where only one category is configured for the assessment definition, and applies only to the priority results list.

Name	Description
Display Score	<p>The Display Scores option indicates whether scores can be displayed in the assessment results. When this option is selected, the assessment scores are displayed in the assessment results. When this option is not selected, the scores are not displayed.</p> <p>In certain circumstances, an administrator might not want to display scores in the assessment results. For example, a risk assessment might have 6 factors that are defined, only 3 of the factors are based on the score. The caseworker might only be interested in the classification that is determined from the score.</p>
Guidance Result Cluster	<p>Holds the identifier that indicates whether the guidance result cluster is to be displayed by default as open or closed.</p>
Factor Display Text	<p>The term factors might be named differently from agency to agency. For example, a factor might be called a dimension or a domain. To cater for this, the Factor Display Text is provided which allows an administrator to define the names to appear in the assessment results for the factor.</p>
Classification Display Text	<p>The term classification might be named differently from agency to agency. For example, a classification might be called a rating or result. To cater for this, the Classification Display Text is provided which allows an administrator to define the names to appear in the assessment results for the factor.</p>
Count Same Score As One Priority	<p>Indicates whether the same factor score that is achieved by more than one client can be counted as a single priority factor.</p>
Result Page	<p>It enables an agency to override the default assessment results page if they need to do so. It is only applicable if graphs are not displayed.</p>
Security Identifiers	<p>When a user attempts to click particular operations on an assessment, the system does a check to ensure that the user has the appropriate privileges to run a particular action.</p>
Categories	<p>After a new category is configured on the category code table, you can select one or more of the categories by selecting them when the assessment definition is created.</p>

3. Click **Save**.

Assessment definition values for Independent Living

Specify the following values for configuring an assessment definition for Independent Living.

Table 72: Assessment definition values

Name	Value
Name	Needs Assessment
Reference	NeedsAssessment

Name	Value
Start Date	Current date
Reassessment Warning Days	5
Assessment Interval Days	90
Assessment Configuration	Needs Assessment Config
Type	Role based
Role Change Allowed	Yes
Reassessment Allowed	Yes
Display Graphs	Yes
Graph By	Graph by Classification
Graph Type	Bar
Priorities Applicable	Yes
Display Guidance	Yes
Group Results By Category	No
Display Score	Yes
Guidance Result Cluster	Closed
Factor Display Text	Needs Assessed
Count Same Score As One Priority	No
Result Page	AssessmentDelivery_viewResultsForInstance

Configuring roles

You configure a role for an assessment definition to target questions at certain clients. Assigning clients to a role ensures that you can ask them the appropriate questions.

Assessment roles

An assessment role represents the part that a client plays in terms of an assessment. For example, an assessment might be assessing a client in their role as Primary Caregiver or as a Secondary Caregiver.

Configuring an assessment role

You must assign at least one role to each assessment definition. Complete the following steps to configure roles for an assessment definition.

About this task

You must define at least one role for an assessment before it can be run, but multiple roles can be configured. You can configure the role such that multiple clients can fill that role during an assessment. You can specify the role as mandatory. It means that at least one client must be specified for the role before the assessment can be carried out by a caseworker. You must decide which questions are applicable to each role. If you decide that questions are not applicable to a role, then those questions are not presented to the client who fulfills that role during the assessment. You must also decide the order in which roles are processed in an assessment.

You must decide whether an abbreviation is specified for an assessment role, which can then be displayed in the assessment results rather than displaying the full name of the role.

Procedure

1. From the assessment definition, select the **Roles** tab and click **New**.

2. From the **New Role** window, enter the following details to create a new role.

Name	Description
Type	The role an individual has regarding an assessment, for example, Primary Caregiver, Secondary Caregiver. The specification of roles for an assessment is mandatory.
Type Abbreviation	<p>Abbreviation of the role type. An abbreviation can be specified for an assessment role. If multiple roles exist in an assessment and displaying the name of each role might take up too much space, use the abbreviation.</p> <p>For example, the role of "Primary Caregiver" can be abbreviated to "PC".</p>
Reference	A reference field that allows the assessment role to be reference from within code. The reference field is unique across all active roles for an assessment definition.
Mandatory	<p>Indicates whether a client must be specified for the role when the assessment is run.</p> <p>For creating an assessment role, you can specify that the role is mandatory. It means that a client must be selected for that role before the assessment can be run. Mandatory roles must be filled before an assessment can proceed.</p>
Multiple Clients	<p>Indicates whether the assessment role applies to multiple clients or not.</p> <p>An administrator can define that multiple clients can fulfill a role. It means that multiple clients can be selected for the same role when you are running an assessment.</p>
Questions Applicable	<p>Indicates whether the assessment questions are asked for this role in the assessment script.</p> <p>For some cases, questions are not asked of clients that are fulfilling a particular role.</p> <p>For example, in the CSN assessment, the role of a focus child does not require questions to be asked of the child. Administrators can specify whether questions are asked of a client that is fulfilling a particular role.</p> <div data-bbox="890 1517 1436 1606" style="border: 1px solid blue; padding: 5px;"> <p>Note: If the assessment type is group-based, then this indicator is not applicable.</p> </div>

3. Click **Save**.

Assessment role values for Independent Living

Specify the following values for configuring an assessment definition role for Independent Living.

Table 73: Assessment definition role values

Name	Value
Type	Claimant Role
Type Abbreviation	Claim Role
Reference	blank
Mandatory	Yes
Multiple Clients	No
Questions Applicable	Yes

Reordering an assessment role

You can configure the order in which roles can be processed in an assessment. The list of clients are displayed based on the ordering configured for their associated roles.

Procedure

1. From the **Roles** tab, click **Reorder**.
2. From the **Set Role Display Order** window, select the role that you want to reorder and click the up/down arrows to move it to the correct order.
3. Click **Save**.

Configuring categories

You need to configure categories to categorize factors and to determine the applicable classifications for the assessment. Examples of categories include Need and Barrier.

Categories

You can specify one or more category for each assessment definition. An assessment is made up of one or more factors. These factors are categorized in order to determine the applicable classifications for the assessment. Examples of categories include Need and Barrier.

A Need category may consist of factors that represent something that the client needs. A Barrier category may consist of factors that prevent a client's progress in achieving something.

Category code table

Categories are defined in the Assess Def Factor Type code table. A new category can be dynamically added to this code table and published as part of system administration. For example, default categories that are provided: Need and Barrier.

Configuring a new code table item

Complete the following steps to add new code table items to an existing Cúram code table. The new code table items are then available for selection on Cúram screens.

Procedure

1. Log in to the Cúram system as a user with the system administrator credentials.
2. Select the **System Configurations** tab, expand the **Shortcuts** menu, and select **Application Data > Code Tables**.
3. To add a code table item to an existing Cúram code table, from the **Search Criteria** cluster, enter the name and/or item and click **Search**.

4. From the action icon, select **New Item** to open the **New Code Table Item** window.
5. Enter the following fields and click **Save** to create a new code table item.

Name	Description
Item Name	The item name.
Technical ID (Code)	The code for the item.

6. From the **Code Tables** tab, click **Publish > Yes**.

Categories specified for Independent Living

The categories that are used for Independent Living are defined in an existing *CT_AssessDefFactorType.ctx* code table therefore no new code table configurations are required. The *Need* category is the only category that is selected during the assessment definition category creation for Independent Living.

Configuring a category

Complete the following steps to configure a category and associate it with an assessment definition.

About this task

A category is mandatory for configuring a factor. There are two steps to category configuration. You must first add the new categories to the category code table and then associate one or more of these categories with an assessment definition.

After a new category is configured on the category code table, it must be associated with an assessment definition before it can be used to categorize factors. There are two ways of associating a category with an assessment definition. When a category code table is configured, it is automatically displayed on the **New Assessment Definition** window.

One or more of the categories that are displayed can be associated with the assessment definition by selecting them when the assessment definition is created. Alternatively, one or more categories can be associated with an assessment definition from the **Categories** tab on the assessment definition as shown here.

Note: Once a category has been associated with an assessment definition, it can be used to group the factors that apply to the assessment definition. For more information, see the *Outcome Management Configuration Guide*.

Procedure

1. From the assessment definition, select the **Categories** tab. Selects the action icon and click **Add Categories**.
2. From the **Add Categories** window, tick the category that you want to add and click **Save**.

Configuring category classifications

You configure a classification to outline different levels of severity for the type of category under which the factor is being assessed.

Classifications

Classifications are the potential results that a client can achieve when assessed for a factor. Classifications are used to define a scale that measures a client's position pertaining to the factors that are being assessed.

For example, the classifications that are configured for a Need category might include 'At Risk', 'In Crisis', 'Stable', and 'Thriving'. When a client is assessed across a number of factors, the classifications that are defined by the administrator for the category of factors represent the results of the assessment.

Classification configuration allows the administrator to define individual classifications and associate them with categories. When a classification is associated with a category, it automatically applies to all factors defined for the selected category.

Note: A number of extra configuration options for classifications are available for individual factors, which provide a finer level of granularity for configuring classifications for factors. For more information, see the *Outcome Management Configuration Guide*.

Classification code table

Classifications are associated with the Classification Division Type code table. A new classification type can be dynamically added to this code table and published as part of system administration. When a classification is added to the classification code table, it is automatically available for selection in the Classification drop-down list.

Configuring a new code table item

Complete the following steps to add new code table items to an existing Cúram code table. The new code table items are then available for selection on Cúram screens.

Procedure

1. Log in to the Cúram system as a user with the system administrator credentials.
2. Select the **System Configurations** tab, expand the **Shortcuts** menu, and select **Application Data > Code Tables**.
3. To add a code table item to an existing Cúram code table, from the **Search Criteria** cluster, enter the name and/or item and click **Search**.
4. From the action icon, select **New Item** to open the **New Code Table Item** window.
5. Enter the following fields and click **Save** to create a new code table item.

Name	Description
Item Name	The item name.
Technical ID (Code)	The code for the item.

6. From the **Code Tables** tab, click **Publish > Yes**.

Classification code table values for Independent Living

Specify the following values for configuring an Classification Division Type code table for Independent Living.

Table 74: Classification division type code table search criteria

Name	Value
Search Criteria Name	ClassDivisionType

Table 75: Classification division type code table new item values

Name	Description	Code 1 Value	Code 2 Value	Code 3 Value
Item Name	The item name which is displayed in the drop-down list on the Classification Division Type window.	Critical	Substantial	Moderate
Technical ID (Code)	The code for the item.	CDT24000	CDT24001	CDT24002

Configuring the classification association with a category

You can associate a classification with a pre-defined category that uses the **Classification** menu. Complete the following steps for configuring a classification for a category.

Procedure

1. From the assessment definitions **Categories** tab, select the action icon and click **New Classification**.
2. From the **New Category Classification** window, enter the following details:

Name	Description
Category	Unique identifier of the category that is associated with this Category Classification, for example, Need, Barrier.
Classification	The type of classification division, for example, need, neutral, strength.
Minimum Priority	A minimum priority number can be set for a classification. The minimum number of a classification division that can be used to consider priority on the assessment results page. For example, if the minimum priority number is set to 1 for a classification of In Crisis, a minimum of one factor must be selected as a priority by a caseworker on the assessment results page.
Maximum Priority	A maximum priority number can be set for a classification. It defines the maximum number of factors that can be specified as a priority on the assessment results page. For example, if the maximum priority number is set to 3 for a classification of Thriving, a maximum of three factors can be selected as a priority by a caseworker on the assessment results page.

Name	Description
Initial Warning Days	<p>The initial warning days configuration setting is provided to support an agency's custom escalation processing. If a priority factor is not addressed within a specified number of days, an agency can create custom processing that is started.</p> <p>An initial warning number of days can be set for each classification. The initial warning number of days is the number of days after which an initial warning is sent to a user.</p> <p>For example, if the initial warning number of days is set to 3. If a factor that is marked as a priority is not addressed, the system automatically might send a notification to the caseworker after three days.</p>
Escalation Warning Days	<p>The escalation warning days configuration setting is provided to support an agency's custom escalation processing. If a priority factor is not addressed within a specified number of days, an agency can create custom processing that is started.</p> <p>An escalation number of days can be set for each classification. The escalation number of days is the number of days after which an escalation warning is sent to a user.</p> <p>For example, if the escalation number of days is set to 10. If a factor that is marked as a priority is not addressed by a caseworker, the system automatically might send a notification to a case supervisor after 10 days.</p>
Hide From Result	<p>A classification can be hidden from assessment results. The Hide From Result indicator dictates whether factors for achieving a particular classification when assessed are hidden in the assessment results.</p> <p>For example, if this indicator is turned on for a classification of Thriving, factors that are classified as Thriving are not displayed in assessment results.</p>

3. Click Save.

Category classification values for Independent Living

There are 3 classifications that are configured for Independent Living. Specify the following values for configuring the 3 classifications for the Need category.

Table 76: New category classifications values

Category	Classification
Need	Critical
Need	Substantial
Need	Moderate

Configuring factors

You configure factors so that the clients needs are assessed when a particular type of assessment is run.

Factors

A factor is an aspect of a client circumstance that is of interest to an organization. Client needs are assessed by using factors.

Typically, a factor is considered either a need or a barrier:

- Needs are things that a client or family requires to be self-sustaining, but currently lack.
- Barriers are conditions that prevent or complicate a client's ability to obtain or achieve something. Examples of assessment factors include substance abuse, mental health, and parenting skills.

Each assessment typically has one or more factors, which describe performance standards for that assessment. Each assessment has unique characteristics and while some factors might look similar between assessments, the details of factors such as classifications, and thresholds, might differ across assessments.

A factor can be added to an outcome plan as a result of an assessment. By running a Strengths and Needs assessment, factors such as Substance Abuse and Mental Health can be added to the outcome plan. A factor can also be added to an outcome plan by a caseworker who can select a factor from a pre-defined list of appropriate factors. For example, this option can be used if a third party is running the assessment and the caseworker wants to record the results manually on the outcome plan. Finally, a factor can be added to an outcome plan when defined by a user to specially address a particular circumstance. For example, through meetings between the caseworker and the client an environmental issue might be identified as a factor. The caseworker can record this factor on the outcome plan.

Guidance text can be defined for factors to help the user understand the steps that can be taken to address a particular issue. For example, the following guidance can be displayed if a client is assessed for Substance Abuse and is classified as 'Need': 'The client can use alcohol or prescribed drugs; however, use does not negatively affect their ability to look after themselves. Minimum support is required; perhaps ensure that the client has support from family and friends, the community, or both.'

Configuring a factor

A factor can be assessed as part of an assessment with other factors or it can be used in a stand-alone manner. Complete the following steps for configuring a factor that is associated with an assessment definition.

Procedure

1. From the assessment definition, select the **Factors** tab and click **New**.
2. From the **New Factor** window, enter the following details.

Name	Description
Name	The name of the factor, for example, Income, Education, Childcare.
Start Date	The start date of the factor.

Name	Description
Category	<p>The type of factor, for example, Need or Barrier.</p> <p>A category must be specified for a factor. Categories must be specified before factors can be added to an assessment. How a factor is categorized depends on the factor.</p> <p>For example, in a self-sufficiency assessment, a range of factors need to be assessed in order to determine whether a person or family is self-sufficient. In such an assessment, a number of factors might be identified such as child care, language proficiency, education & literacy. Similarly, a range of Barrier factors might be identified such as mental health, physical health, alcohol abuse. So, for this self-sufficiency assessment, all factors can be classified as either a Need or a Barrier category.</p> <div style="border: 1px solid blue; padding: 5px; margin-top: 10px;"> <p>Note: Once a category is selected for a factor, any classifications that are associated with that category are the classifications that are used to classify that factor during assessment.</p> </div>
Reference	<p>The reference identification for the factor definition so the factor can be referenced by the rules.</p>
End Date	<p>The end date of the factor.</p>
Threshold	<p>Each factor has a threshold value, which represents a marker/value on a factor scale. You use the threshold value to indicate the relative level of functioning for a factor.</p> <p>For example, on a scale of 1-10, a threshold of 5 can indicate a sufficient level of functioning. Depending on the assessment, the meaning of the threshold can vary.</p> <p>Threshold is a string value, which allows the threshold value to be blank and not be defaulted to zero when the threshold is not specified. For example, for a self-sufficiency assessment, the threshold can represent the value that must be satisfied for a client to be considered self-sufficient.</p> <p>For a back-to-work assessment, the threshold can represent a value that must be satisfied for a client to be considered to be able to obtain and sustain employment.</p>

Name	Description
Merge	<p>The same assessment can be run multiple times for the same person and in some cases it is appropriate to merge the factor results produced.</p> <p>For example, a CSN assessment can be run for client 1 focusing on client 2. It might subsequently be run again for client 1 focusing on client 3. In this case, client 1 is assessed twice for Substance Abuse. The results for substance abuse can be merged that is, only one result for substance abuse is displayed when an assessment is run, rather than two sets of results.</p> <p>The merge indicator dictates if factor results are merged or not when an assessment is run. If the merge is enabled, the results are merged and the latest factor results is displayed.</p>
Planning Applicable	<p>Indicates whether the factor is a planning factor. If the factor is a planning factor, the caseworker can associate activities and objectives to the factor. If the factor is not a planning factor, then the factor is only used to capture results and is not involved in planning.</p>

3. Click Save.

Factor values for Independent Living

Specify the following values for configuring 2 assessment definition factors for Independent Living.

Table 77: Needs Assessment factors configured

Name	Description
Assess Needs under Health and Safety	Health and Safety. Includes freedom from harm, abuse or neglect, and taking account of wider issues of housing and community safety.
Management of Daily Routine	Management of daily routine; the ability to manage personal and other daily routines.

Table 78: The 5 factor values

Name	Value
Start Date	Current date
Category	Need
Planning Applicable	Yes

Mapping CDA outcomes to factors

You must map each of the decision assist outcomes to factors or factor classifications.

Procedure

1. Select the **Administration Workspace** tab, expand the **Shortcuts** menu, select **Outcome Management > Assessment Definitions**.
2. From the **Assessment Definitions** window, click on an assessment name.

3. From the **Assessment** window, click on the **Factors** tab.
4. From the **Factors** window, click on a factor name.
5. From the **ACTIONS** menu, click on the **Map CDA Outcome** option.
6. From the **Map CDA Outcome** window, select the appropriate outcome from the drop-down list.
7. Click **Save**.

Decision assist outcome factor mapping values for Independent Living

Specify the following values when associating decision assist outcomes with factors for Independent Living.

Table 79: Daily Routine outcome values

Name	Value
Outcome	Daily Routine - Needs

Table 80: Health and Safety outcome values

Name	Value
Outcome	Health and Safety - Needs

Configuring factor classifications

You can configure a classification for individual factors, which provide a finer level of granularity. Classifications outline the different levels of severity for the type of category under which the factor is being assessed.

Factor classifications

Classifications are the potential results that can be achieved for a factor. For example, a need category might include classifications such as Vulnerable, Engaged, Progressing, and Self-Sufficient. Factors are assigned to a category and thus adopt the category classification.

Once the classifications described in are configured, they are automatically associated with a factor when a factor category is specified. Administrators can configure additional information for each classification at the factor level. Factor classifications represent measurement indicators for an individual factor. A classification is a portion of the scale that measures the actual progress of a client, for example, 'Need', 'Neutral', 'Strength'. A subdivision defines a portion of the range that is entered on the classification, which enables a finer level of measurement.

A maximum and minimum range can be set for factor classifications. It is the range that a factor score must fall between in order to achieve that classification. Administrators can also choose to hide factors that achieve a particular classification from assessment results.

Activities can also be configured for a factor classification and classification subdivision. It allows activities to be recommended to a caseworker when a client achieves a particular score/classification when assessed.

The following can also be recorded for factor classifications:

- Definitions
- Subdivisions
- Guidance Text

Configuring a factor classification

A measurement indicator of a clients progress for a factor. A factor classification can be either a classification or classification subdivision. A classification is a portion of the scale that measures the actual progress of a client for example, Need 0-5. Complete the following steps for configuring a factor classification.

Procedure

1. From the assessment definition, select the **Factors** tab.
2. From the **Factors** list, select a factors name, which opens in its own tab.
3. Select the **Classification** tab.
4. For each of the classifications, select the action icon and click **Edit** to add the following details.

Name	Description
Minimum Range Maximum Range	A minimum and maximum range can be set for classifications. It enables the administrator to configure how classifications are rated on a scale. For example, the CSN substance abuse factor has a 'Strength' range of 0 to 5, and a 'Need' range of -3 to 0. When a client is assessed for substance abuse and they achieve a score of -2, they are classified as having a 'Need' since -2 falls within the 'Need' range.
Hide from Priority Selection	Administrators can hide factor classifications from assessment results. If a factor classification is hidden, it means that the factor is not displayed to the caseworker in the assessment results if the classification is achieved by a client. It allows the administrator to specify which factor classifications are displayed for a factor. For example, an agency might want a caseworker to concentrate on a substance abuse factor where a client is classified as a need, but not a strength. In this case, a factor classification of 'Strength' can be hidden.
Definition	A definition provides a description of what a particular score means. For example, it aims to describe a clients situation if they achieve a particular classification.
Guidance Text	The guidance text that is defined for a factor classification is displayed in the caseworker application within the assessment results. Guidance assists a caseworker in the analysis of client results and helps them to deal with clients to achieve particular results. It might contain items or information that can be considered by a caseworker for considering activities to address the factor result.

5. Click **Save**.

Classification values for Independent Living

Specify the following values for configuring the 3 classifications for a factor.

Table 81: Critical classification configuration values

Name	Value
Minimum Range	16
Maximum Range	31
Hide from Priority Selection	No
Definition	Critical
Guidance Text	Factor 2: Critical 16-31. There is an inability to carry out vital personal care or domestic routines. Without the provision of community care services, there would be a breakdown of care or living arrangements, or they would become unsafe. There would also be a risk of significant harm, neglect, or abuse.

Table 82: Substantial classification configuration values

Name	Value
Minimum Range	8
Maximum Range	15
Hide from Priority Selection	No
Definition	Substantial
Guidance Text	Factor 2: Substantial 8-15. There is an inability to carry out most of essential personal care or domestic routines. A person needs daily or continuous help and support with essential activities of daily living. In particular whose care or living arrangements break down or become unsafe without provision of community care services. A person who is unable to manage their own essential activities of daily living without the provision of community care services to support them to sustain their caring role.

Table 83: Moderate classification configuration values

Name	Value
Minimum Range	1
Maximum Range	7
Hide from Priority Selection	No
Definition	Moderate
Guidance Text	Factor 2: Moderate 1-7. There is an inability to carry out several personal care or domestic routines. A person who is, or will be in the foreseeable future, unable to manage most of activities of daily living. Or other daily routines and sustain their caring role, without the provision of care services. People who need some support or assistance to manage independently each week, but less often than every day.

Classification subdivisions

You can use classification subdivisions to further separate and define information for smaller ranges within the main factor classification range. Subdivisions allow further processing to be assigned to factor classifications.

For example, an income factor can be classified as 'In Crisis' with a range of -5 to 0. The 'In Crisis' classification division can be further subdivided. The administrator sets three subdivisions for the values -5, -4 to -3, and -2 to 0. Each subdivision value has a specific definition:

- -2 to 0: Family receives little or no income
- -4 to -3: Income and / or budgeting skills are limited to the point that the family is unable to meet its basic needs
- -5: The family is unwilling or unable to plan or save
- -4 to -3: Client presents with suicidal tendencies
- -5: Client is a danger to themselves.

Configuring a classification subdivision

A subdivision defines a portion of the range that is entered on the classification, which enables a finer level of measurement for example, a value of 1. Complete the following steps for configuring a subdivision.

Procedure

1. From the assessment definition, select the **Factors** tab.
2. From the **Factors** list, select a factors name, which opens in its own tab.
3. Select the **Classification** tab.
4. For each of the classifications, you can add subdivisions by selecting the action icon and click **Add Subdivision**.
5. From the **Add Subdivision** window, enter the following details.

Name	Description
Minimum Range Value	The minimum range value for a classification division.
Maximum Range Value	The maximum range value for a classification division.
Definition	A definition provides a description of what a particular score means. For example, it aims to describe a clients situation if they achieve a particular classification.
Guidance Text	The guidance text that is defined for a factor classification is displayed in the caseworker application within the assessment results. Guidance assists a caseworker in the analysis of client results and helps them to deal with clients to achieve particular results. It might contain items or information that can be considered by a caseworker for considering activities to address the factor result.

6. Click **Save**.

Classification subdivision values for Independent Living

Specify the following values for configuring the subdivision classifications specific for the 2 factors that are created for Independent Living.

Table 84: Critical classification subdivisions

Range	Factor 1 - Health and Safety - Guidance	Factor 2 - Daily Routine - Guidance
16 to 16	Factor 1: Critical 16. Client in need of advice on psychiatric service	Factor 2: Critical 16. Client requires a wheelchair to get around.
17 to 17	Factor 1: Critical 17. Client in need of advice on psychiatric services and provision of housekeeping services.	Factor 2: Critical 17. Client requires a wheelchair and assistance feeding.
18 to 18	Factor 1: Critical 18. Client in need of advice on psychiatric services and provision of nursing services.	Factor 2: Critical 18. Client requires a wheelchair and assistance washing.
19 to 19	Factor 1: Critical 19. Client in need of advice on psychiatric services and the provision of housekeeping and nursing services.	Factor 2: Critical 19. Client requires a wheelchair and assistance feeding and washing.
20 to 20	Factor 1: Critical 20. Client in need of advice on psychiatric services and the provision of budgeting services.	Factor 2: Critical 20. Client requires a wheelchair and assistance shopping.
21 to 21	Factor 1: Critical 21. Client in need of advice on psychiatric services and the provision of household and budgeting services.	Factor 2: Critical 21. Client requires a wheelchair and assistance feeding and shopping.
22 to 22	Factor 1: Critical 22. Client in need of advice on psychiatric services and the provision of nursing and budgeting services.	Factor 2: Critical 22. Client requires a wheelchair and assistance washing and shopping.
23 to 23	Factor 1: Critical 23. Client in need of advice on psychiatric services and the provision of housekeeping, nursing, and budgeting services.	Factor 2: Critical 23. Client requires a wheelchair and assistance feeding, washing, and shopping.
24 to 24	Factor 1: Critical 24. Client in need of advice on psychiatric services and secure care.	Factor 2: Critical 24. Client requires a wheelchair and assistance using the toilet.
25 to 25	Factor 1: Critical 25. Client in need of advice on psychiatric services and secure care, and the provision of housekeeping services.	Factor 2: Critical 25. Client requires a wheelchair and assistance with feeding and using the toilet.
26 to 26	Factor 1: Critical 26. Client in need of advice on psychiatric services and secure care, and the provision of nursing services.	Factor 2: Critical 26. Client requires a wheelchair and assistance with washing and using the toilet.

Range	Factor 1 - Health and Safety - Guidance	Factor 2 - Daily Routine - Guidance
27 to 27	Factor 1: Critical 27. Client in need of advice on psychiatric services and secure care, and the provision of housekeeping, nursing, and budgeting services.	Factor 2: Critical 27. Client requires a wheelchair and assistance with feeding, washing and using the toilet.
28 to 28	Factor 1: Critical 28. Client in need of advice on psychiatric services and secure care, and provision of budgeting services.	Factor 2: Critical 28. Client requires a wheelchair and assistance with shopping and using the toilet.
29 to 29	Factor 1: Critical 29. Client in need of advice on psychiatric services and secure care, and the provision of housekeeping and budgeting services.	Factor 2: Critical 29. Client requires a wheelchair and assistance with feeding, shopping and using the toilet.
30 to 30	Factor 1: Critical 30. Client in need of advice on psychiatric services and secure care, and the provision of nursing and budgeting services.	Factor 2: Critical 30. Client requires a wheelchair and assistance with washing, shopping and using the toilet.

Table 85: Substantial classification subdivisions

Range	Factor 1 - Health and Safety - Guidance	Factor 2 - Daily Routine - Guidance
8 to 8	Factor 1: Substantial 8. Provide client with advice on secure care facilities.	Factor 2: Substantial 8. Client needs assistance using toilet.
9 to 9	Factor 1: Substantial 9. Provide client with advice on secure care and provide housekeeping services.	Factor 2: Substantial 9. Client needs assistance with feeding and using toilet.
10 to 10	Factor 1: Substantial 10. Provide client with advice on secure care and provide nursing services.	Factor 2: Substantial 10. Client needs assistance with washing and using toilet.
11 to 11	Factor 1: Substantial 11. Provide client with advice on secure care, and provide housekeeping and nursing services.	Factor 2: Substantial 11. Client needs assistance with feeding, washing and using toilet.
12 to 12	Factor 1: Substantial 12. Provide client with advice on secure care, and provide budgeting services.	Factor 2: Substantial 12. Client needs assistance with shopping and using toilet.
13 to 13	Factor 1: Substantial 13. Provide client with advice on secure care, and provide budgeting and housekeeping services.	Factor 2: Substantial 13. Client needs assistance with feeding, shopping and using toilet facilities.
14 to 14	Factor 1: Substantial 14. Provide client with advice on secure care, and provide budgeting and nursing services	Factor 2: Substantial 14. Client needs assistance with washing, shopping and using toilet facilities.
15 to 15	Factor 1: Substantial 15. Provide client with advice on secure care, and provide budgeting, nursing and housekeeping services.	Factor 2: Substantial 15. Client needs assistance with feeding, washing, shopping and using toilet facilities.

Table 86: Moderate classification subdivisions

Range	Factor 1 - Health and Safety - Guidance	Factor 2 - Daily Routine - Guidance
1 to 1	Factor 1: Moderate 1. Client may need housekeeping services.	Factor 2: Moderate 1. Client needs assistance with feeding.
2 to 2	Factor 1: Moderate 2. Client may need nursing services.	Factor 2: Moderate 2. Client needs assistance with washing.
3 to 3	Factor 1: Moderate 3. Client may need housekeeping and nursing services.	Factor 2: Moderate 3. Client needs assistance with feeding and washing.
4 to 4	Factor 1: Moderate 4. Client may need budgeting services.	Factor 2: Moderate 4. Client needs assistance with shopping.
5 to 5	Factor 1: Moderate 5. Client may need housekeeping and budgeting services.	Factor 2: Moderate 5. Client needs assistance with feeding and shopping.
6 to 6	Factor 1: Moderate 6. Client may need nursing and budgeting services.	Factor 2: Moderate 6. Client needs assistance with washing and shopping.
7 to 7	Factor 1: Moderate 7. Client may require housekeeping, nursing and budgeting services.	Factor 2: Moderate 7. Client needs assistance with feeding, washing and shopping.

Configuring recommendations

You can configure a recommendation either through the factor recommendation tab or as part of the factor classification subdivision. You need to configure the recommendations as part of the subdivision if you are configuring at a more granular level otherwise configure through the recommendations tab.

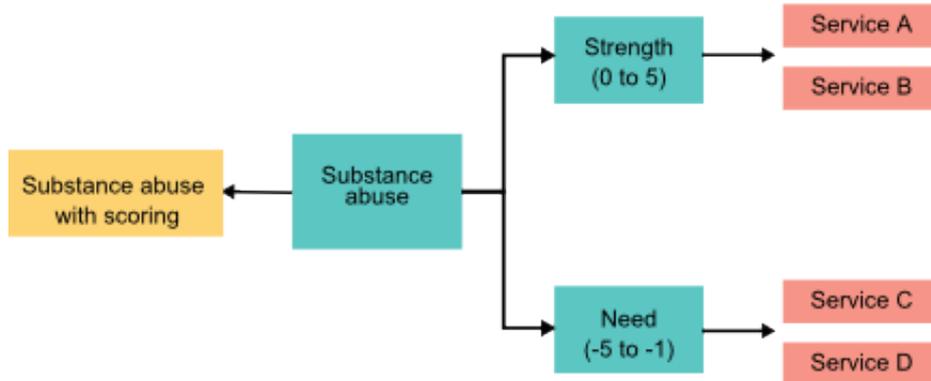
Recommendations

Recommendations are suggestions of activities (services, actions, or referrals) that are targeted to address a client's specific circumstances. These recommendations are often based on best practices or suggestions from subject matter experts.

Recommendations are displayed in the activity workspace in the outcome plan when clients are assessed and recommendations are configured for the assessment that is run. The recommendation that is displayed depends on the client's circumstances (assessment results).

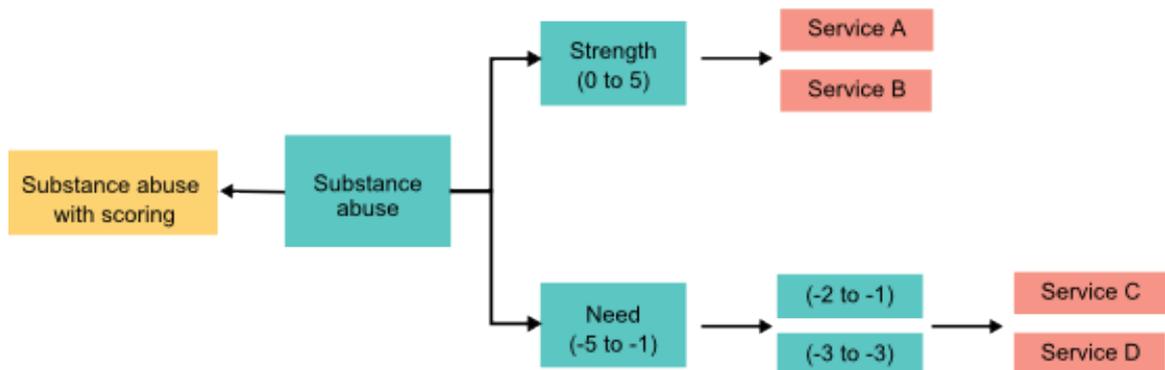
An activity can be recommended in two ways. It can be recommended by the system when that outcome plan is created for a client. It can also be associated with a factor such that the action is recommended when a client achieves a particular result from being assessed.

For example, you can configure that a counseling service (Service C) is recommended if a client scores a classification of 'Need' on the Substance Abuse factor.



Activities can also be recommended at a more granular level, for example a day retreat program (Service D) can be recommended if a client scores a value of -5.

Recommendations can be created for services, referrals, and actions. A recommendation and reason can be specified. A recommendation indicates whether the caseworker is advised to add the recommended activity or objective to the outcome plan for a client, or whether it is discretionary to do so. The reason indicates why you think the recommended activity or objective must be added to the outcome plan.



Objectives can also be configured such that they are recommended when an assessment is run.
Note: This configuration is reserved for future use.

Recommending an action for an assessment

Complete the following steps for configuring an action recommendation for a factor.

Procedure

1. From the assessment definition, select the **Factors** tab.

2. From the **Factors** list, select a factors name, which opens in its own tab.
3. Select the **Recommendations** tab.
4. From the **ACTIONS** icon, select **Recommend Action**.
5. From the **Recommend Action** window, enter in the following details to create a recommendation action.

Name	Description
Action	You can select an action from the drop-down list, which is pre-configured as part of configuring an action.
Recommendation	Indicates whether the recommendation is advised or discretionary.
Reason	You can enter the reason that a recommendation is recommended for a client.
Classifications	You can select the classifications that you want to associate the action against.
Select Programs	You can select the program that you want to associate the action against.

6. Click **Save**.

Recommendation values for Independent Living

For Independent Living, the recommendations are configured as part of configuring a subdivision recommendation.

Configuring a subdivision recommendation action

Complete the following tasks for configuring a subdivision recommendation.

Procedure

1. From the assessment definition, select the **Factors** tab.
2. From the **Factors** list, select a factors name, which opens in its own tab.
3. Select the **Classification** tab.
4. Expand a classification and click the **Subdivisions** tab.
5. For each range specified, select the action icon and click **Recommend Action**.
6. From the **Recommend Action** window, enter the following details.

Name	Description
Action	You can select an action from the drop-down list, which is pre-configured as part of configuring an action.
Recommendation	Indicates whether the recommendation is advised or discretionary.
Reason	You can enter the reason that a recommendation is recommended for a client.
Program	You can select the program that you want to associate action against.

7. Click **Save**.

Health and safety factor subdivision recommendation values for Independent Living

Specify the following values for configuring subdivision action recommendations for Independent Living. The action recommendations are not linked to programs for Independent Living.

To give you an example of how the logic (rules) is defined for Independent Living for the first 3 questions that are specified in the assessment. Open up the Needs Assessment Matrix to see the scores that are specified for each question.

If the client specifies "No" to question 1 "Is the home clean and tidy", you see from table 2 that housekeeping services are recommended. You see in the Needs Assessment Matrix that the score is 1 if the client specifies "No".

For question 2, if the client specifies "Yes" to question 2 "Does the client suffer from pressure scores", nursing services are recommended. You see in the Needs Assessment Matrix that the score is 2 if the client specifies "No".

If 3 is the final score that is achieved by the client assessment, you see that for range 3 to 3 that housekeeping services and nursing services are recommended.

Table 87: Action configurations

Activity	Activity Type	Recommendation	Reason
Advise on Psychiatric Services	Action	Advised	Advise on Psychiatric Services Recommendation
Budgeting Services	Action	Advised	Budgeting Services Recommendation
Housekeeping Services	Action	Advised	Housekeeping Services Recommendation
Nursing Services	Action	Advised	Nursing Services Recommendation
Advise on Secure Care	Action	Advised	Advise on Secure Care Recommendation

Table 88: Moderate classification subdivision recommendations

Range	Budgeting Services	Housekeeping Services	Nursing Services
1 to 1	No	Yes	No
2 to 2	No	No	Yes
3 to 3	No	Yes	Yes
4 to 4	Yes	No	No
5 to 5	Yes	Yes	No
6 to 6	Yes	No	Yes
7 to 7	Yes	Yes	Yes

Table 89: Substantial classification subdivision recommendations

Range	Budgeting Services	Housekeeping Services	Nursing Services	Advise on Secure Care
8 to 8	No	No	No	Yes
9 to 9	No	Yes	No	Yes

Range	Budgeting Services	Housekeeping Services	Nursing Services	Advise on Secure Care
10 to 10	No	No	Yes	Yes
11 to 11	No	Yes	Yes	Yes
12 to 12	Yes	No	No	Yes
13 to 13	Yes	Yes	No	Yes
14 to 14	Yes	No	Yes	Yes
15 to 15	Yes	Yes	Yes	Yes

Table 90: Critical classification subdivision recommendations

Range	Advise on Psychiatric Services	Budgeting Services	Housekeeping Services	Nursing Services	Advise on Secure Care
16 to 16	Yes	No	No	No	No
17 to 17	Yes	No	Yes	No	No
18 to 18	Yes	No	No	Yes	No
19 to 19	Yes	No	Yes	Yes	No
20 to 20	Yes	Yes	No	No	No
21 to 21	Yes	Yes	Yes	No	No
22 to 22	Yes	Yes	No	Yes	No
23 to 23	Yes	Yes	Yes	Yes	No
24 to 24	Yes	No	Yes	No	Yes
25 to 25	Yes	No	No	Yes	Yes
26 to 26	Yes	No	Yes	Yes	Yes
27 to 27	Yes	No	Yes	Yes	Yes
28 to 28	Yes	Yes	No	No	Yes
29 to 29	Yes	Yes	Yes	No	Yes
30 to 30	Yes	Yes	No	Yes	Yes

Daily routine factor subdivision recommendation values for Independent Living

Specify the following values for configuring subdivision action recommendations for Independent Living. The action recommendations are not linked to programs for Independent Living.

Table 91: Action configurations

Activity	Activity Type	Recommendation	Reason
Feeding / Carer Services	Action	Advised	Feeding / Carer Services Recommendation
Washing / Carer Services	Action	Advised	Washing / Carer Services Recommendation
Shopping / Carer Services	Action	Advised	Shopping / Carer Services Recommendation

Activity	Activity Type	Recommendation	Reason
Toilet / Carer Services	Action	Advised	Toilet / Carer Services Recommendation
Wheelchair Service	Action	Advised	Wheelchair Service Recommendation

Table 92: Moderate classification subdivision recommendations

Range	Feeding / Carer Services	Washing / Carer Services	Shopping / Carer Services
1 to 1	Yes	No	No
2 to 2	No	Yes	No
3 to 3	Yes	Yes	No
4 to 4	No	No	Yes
5 to 5	Yes	No	Yes
6 to 6	No	Yes	Yes
7 to 7	Yes	Yes	Yes

Table 93: Substantial classification subdivision recommendations

Range	Feeding / Carer Services	Washing / Carer Services	Shopping / Carer Services	Toilet / Carer Services
8 to 8	No	No	No	Yes
9 to 9	Yes	No	No	Yes
10 to 10	No	Yes	No	Yes
11 to 11	Yes	Yes	No	Yes
12 to 12	No	No	Yes	Yes
13 to 13	Yes	No	Yes	Yes
14 to 14	No	Yes	Yes	Yes
15 to 15	Yes	Yes	Yes	Yes

Table 94: Critical classification subdivision recommendations

Range	Feeding / Carer Services	Washing / Carer Services	Shopping / Carer Services	Toilet / Carer Services	Wheelchair Service
16 to 16	No	No	No	No	Yes
17 to 17	Yes	No	No	No	Yes
18 to 18	No	Yes	No	No	Yes
19 to 19	Yes	Yes	No	No	Yes
20 to 20	No	No	Yes	No	Yes
21 to 21	Yes	No	Yes	No	Yes
22 to 22	No	Yes	Yes	No	Yes
23 to 23	Yes	Yes	Yes	No	Yes
24 to 24	No	No	No	Yes	Yes
25 to 25	Yes	No	No	Yes	Yes

Range	Feeding / Carer Services	Washing / Carer Services	Shopping / Carer Services	Toilet / Carer Services	Wheelchair Service
26 to 26	No	Yes	No	Yes	Yes
27 to 27	Yes	Yes	No	Yes	Yes
28 to 28	No	No	Yes	Yes	Yes
29 to 29	Yes	No	Yes	Yes	Yes
30 to 30	No	Yes	Yes	Yes	Yes

Configuring case associations with an assessment definition

You can configure an association between an assessment definition and a case so that the assessment is available to run on the case.

Assessments association with cases and outcome plans

Assessments can be associated with cases and outcome plans. It allows the administrator to configure which assessments can be run from a particular case. Once the case is associated with an assessment, the caseworker can then run the assessment for any cases of that type.

Two extra settings are provided:

- The **On Home Page** setting dictates whether assessment results are displayed on the home page of the associated case. It allows an administrator to display the most pertinent assessment results on the home page of the case.
- The **Assessment Available From** setting dictates where an assessment can be run from within an outcome plan.

For example, the assessment can be run from within a review of an outcome plan, it can be run from within the outcome plan itself.

Associating an assessment definition with a case

Complete the following steps to configure an association between an assessment definition and a case.

About this task

Associating an assessment type and a case type enables that type of assessment to be run from that type of case. For example, a needs assessment can be run from a Reunification outcome plan.

Procedure

1. From the assessment definition, select the **Cases** tab and click **Add**.
2. From the **Add Cases** window, select the case that you want to associate your assessment definition with and click **Save**.
3. For the case type, select the actions icon and click **Show on Home Page** in order for the assessment to be displayed on the home page of the associate case.
4. For the case type, select the actions icon and click **Edit Assessment Availability**.
5. From the **Edit Assessment Availability** window, select where an assessment can be run from within an outcome plan and click **Save**.

Assessment definition case association for Independent Living

Associate the assessment definition with the following Outcome Plan. Configure the assessment to be displayed on the Outcome Plan home page and that the assessment can be run from within the outcome plan.

Table 95: Assessment Definition Outcome Plan Link

Type	Name	Assessment Available From	On Home Page
Outcome Plan	Needs Outcome Plan	Plan	Yes

Saving your assessment configuration files

You must save your configurations.

Quick reference for saving your assessment configuration files

Reference table for all files that are associated with saving your assessment configuration.

The following descriptions detail each column of the reference table and what their purpose is.

- Task Name: The name of the current task.
- Data Contained In: The relevant file or files in the `%CURAM_DIR%\EJBServer\build\dataextractor` folder, which contains data that you need to extract for the step. `%CURAM_DIR%` is the Curam installation directory, which by default is `C:\Merative\Curam\Development`.
- Files To Be Copied From Data Extractor: A list of files that the user must copy from the `%CURAM_DIR%\EJBServer\build\dataextractor` folder for each task.
- Files To Be Created: A list of files that need to be created by the user for each task.

Table 96: Assessment Configurations File Reference Table

Task Name	Data Contained In	Files To Be Copied From Data Extractor	Files To Be Created
Saving your assessment definition configuration files		<code>ASSESSMENTDEFINITION.dmx</code>	<code>LOCALIZABLETEXT.dmx</code>
Saving your assessment role configuration files			<code>ASSESSMENTROLE.dmx</code> , <code>LOCALIZABLETEXT.dmx</code> , <code>TEXTTRANSLATION.dmx</code>
Saving your category configuration files	<code>CODETABLEITEM.dmx</code>	<code>FACTORCATEGORY.dmx</code>	<code>CATEGORYCLASSIFICATION.dmx</code> , <code>CT_CaseClassification.dmx</code>
Saving your factor configuration files		<code>FACTOR.dmx</code> , <code>FACTORLINK.dmx</code>	<code>LOCALIZABLETEXT.dmx</code> , <code>TEXTTRANSLATION.dmx</code>
Saving your classification configuration files	<code>CODETABLEITEM.dmx</code>		<code>CT_ClassDivisionType.ctx</code>
Saving your factor classification configuration files		<code>FACTORCLASSIFICATION.dmx</code>	<code>CLASSIFICATIONGUIDANCE.dmx</code>
Saving your case association configuration files		<code>ASSESSMENTDEFINITIONCASELINK.dmx</code>	

Saving Your Assessment Configuration Reference Table

Reference table for all files that are associated with saving your assessment configuration.

About this task

- **Task Name:** The name of the current task.
- **Data Contained In:** The relevant file or files in the `%CURAM_DIR%\EJBServer\build\dataextractor` folder, which contains data that you need to extract for the step. `%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.
- **Files To Be Copied From Data Extractor:** A list of files that the user must copy from the `%CURAM_DIR%\EJBServer\build\dataextractor` folder for each task.
- **Files To Be Created:** A list of files that need to be created by the user for each task.

Table 97:

Task Name	Data Contained In	Files To Be Copied From Data Extractor	Files To Be Created
Saving your assessment definition configuration files		<ul style="list-style-type: none"> • ASSESSMENTDEFINITION.dmx • LOCALIZABLETEXT.dmx • TEXTTRANSLATION.dmx 	
Saving your assessment role configuration files		<ul style="list-style-type: none"> • ASSESSMENTROLE.dmx • LOCALIZABLETEXT.dmx • TEXTTRANSLATION.dmx 	
Saving your category configuration files	<ul style="list-style-type: none"> • CODETABLEITEM.dmx 	<ul style="list-style-type: none"> • FACTORCATEGORY.dmx • CATEGORYCLASSIFICATION.dmx 	<ul style="list-style-type: none"> • CT_AssessDefFactorType.ctx
Saving your factor configuration files		<ul style="list-style-type: none"> • FACTOR.dmx • FACTORLINK.dmx • LOCALIZABLETEXT.dmx • TEXTTRANSLATION.dmx 	
Saving your classification configuration files	<ul style="list-style-type: none"> • CODETABLEITEM.dmx 		<ul style="list-style-type: none"> • CT_ClassDivisionType.ctx
Saving your factor classification configuration files		<ul style="list-style-type: none"> • FACTORCLASSIFICATION.dmx • CLASSIFICATIONGUIDANCE.dmx • LOCALIZABLETEXT.dmx • TEXTTRANSLATION.dmx 	
Saving your case association configuration files		<ul style="list-style-type: none"> • ASSESSMENTDEFINITIONCASELINK.dmx 	

Saving Your Assessment Configuration Reference Table

Reference table for all files that are associated with saving your assessment configuration.

About this task

- **Task Name:** The name of the current task.
- **Data Contained In:** The relevant file or files in the `%CURAM_DIR%\EJBServer\build\dataextractor` folder, which contains data that you need to extract for the step.

`%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

- Files To Be Copied From Data Extractor: A list of files that the user must copy from the `%CURAM_DIR%\EJBServer\build\dataextractor` folder for each task.
- Files To Be Created: A list of files that need to be created by the user for each task.

Table 98:

Task Name	Data Contained In	Files To Be Copied From Data Extractor	Files To Be Created
Saving your assessment definition configuration files		<ul style="list-style-type: none"> • ASSESSMENTDEFINITION.dmx • LOCALIZABLETEXT.dmx • TEXTTRANSLATION.dmx 	
Saving your assessment role configuration files		<ul style="list-style-type: none"> • ASSESSMENTROLE.dmx • LOCALIZABLETEXT.dmx • TEXTTRANSLATION.dmx 	
Saving your category configuration files	<ul style="list-style-type: none"> • CODETABLEITEM.dmx 	<ul style="list-style-type: none"> • FACTORCATEGORY.dmx • CATEGORYCLASSIFICATION.dmx 	<ul style="list-style-type: none"> • CT_AssessDefFactorType.ctx
Saving your factor configuration files		<ul style="list-style-type: none"> • FACTOR.dmx • FACTORLINK.dmx • LOCALIZABLETEXT.dmx • TEXTTRANSLATION.dmx 	
Saving your classification configuration files	<ul style="list-style-type: none"> • CODETABLEITEM.dmx 		<ul style="list-style-type: none"> • CT_ClassDivisionType.ctx
Saving your factor classification configuration files		<ul style="list-style-type: none"> • FACTORCLASSIFICATION.dmx • CLASSIFICATIONGUIDANCE.dmx • LOCALIZABLETEXT.dmx • TEXTTRANSLATION.dmx 	
Saving your case association configuration files		<ul style="list-style-type: none"> • ASSESSMENTDEFINITIONCASELINK.dmx 	

Saving your assessment definition configuration files

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the `extractdata` build target.
2. From the `%CURAM_DIR%\EJBServer\build\dataextractor` directory, copy the following DMX files.

File name	Description
<code>ASSESSMENTDEFINITION.dmx</code>	This entity stores the assessment definition information.
<code>LOCALIZABLETEXT.dmx</code>	This entity holds a link to text translations for descriptions that appear throughout the application.
<code>TEXTTRANSLATION.dmx</code>	This entity holds the text translation for various locales.

Note: %CURAM_DIR% is the Cúram installation directory, which by default is C:\Merative\Curam\Development.

3. From %CURAM_DIR%\EJBServer, run **build database**.
4. Save your configuration files.

Assessment definition configuration files for Independent Living

The Independent Living assessment definition configurations files are in the following location in the accelerator.

Table 99: DMX files

File name	Location
ASSESSMENTDEFINITION.dmx	%CURAM_DIR%\EJBServer\components\IndependentLiving\data
LOCALIZABLETEXT.dmx	\initial
TEXTTRANSLATION.dmx	

Note: %CURAM_DIR% is the Cúram installation directory, which by default is C:\Merative\Curam\Development.

Saving your assessment role configuration files

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the *extractdata* build target.
2. From the %CURAM_DIR%\EJBServer\build\dataextractor directory, copy the following DMX files.

File name	Description
ASSESSMENTROLE.dmx	This entity stores the assessment role information.
LOCALIZABLETEXT.dmx	This entity holds a link to text translations for descriptions that appear throughout the application.
TEXTTRANSLATION.dmx	This entity holds the text translation for various locales.

Note: %CURAM_DIR% is the Cúram installation directory, which by default is C:\Merative\Curam\Development.

3. From %CURAM_DIR%\EJBServer, run **build database**.
4. Save your configuration files.

Assessment role configuration files for Independent Living

The Independent Living assessment role configurations files are in the following location in the accelerator.

Table 100: DMX files

File name	Location
<i>ASSESSMENTROLE.dmx</i>	%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial
<i>LOCALIZABLETEXT.dmx</i>	
<i>TEXTTRANSLATION.dmx</i>	

Note: %CURAM_DIR% is the Cúram installation directory, which by default is C:\Merative\Curam\Development.

Saving your category configuration files

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the *extractdata* build target.
2. From the %CURAM_DIR%\EJBServer\build\dataextractor directory, copy the following DMX files.

File name	Description
<i>FACTORCATEGORY.dmx</i>	This entity stores the categories that can be used to categorize a factor, Need and Barrier for example.
<i>CATEGORYCLASSIFICATION.dmx</i>	This entity stores the classifications that are associated with a category that can be used to classify a factor, Critical and Substantial for example.

Note: %CURAM_DIR% is the Cúram installation directory, which by default is C:\Merative\Curam\Development.

3. From the %CURAM_DIR%\EJBServer\build\dataextractor\CODETABLEITEM.dmx file, search for *AssessDefFactorType*.
4. If there is no pre-existing code table in the %CURAM_DIR%\EJBServer\components\COMPONENT_NAME\codetable directory, create a new code table for the following code tables. Add the content from the *CODETABLEITEM.dmx* file. If the code table exists, add the content to the existing code table.

Table 101: Code tables files

File name	Description
<i>CT_AssessDefFactorType.dmx</i>	The file containing the entries for the <i>AssessDefFactorType</i> code table.

5. From %CURAM_DIR%\EJBServer, run **build ctgen database**.
6. From %CURAM_DIR%\webclient, run **build client**.
7. Save your configuration files.

Category configuration files for Independent Living

The Independent Living category configurations files are in the following location in the accelerator.

Table 102: DMX files

File name	Location
<i>FACTORCATEGORY.dmx</i> <i>CATEGORYCLASSIFICATION.dmx</i>	<code>%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial</code>
<p>Note: <code>%CURAM_DIR%</code> is the Cúram installation directory, which by default is <code>C:\Merative\Curam\Development</code>.</p>	

Saving your factor configuration files

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the *extractdata* build target.
2. From the `%CURAM_DIR%\EJBServer\build\dataextractor` directory, copy the following DMX files.

File name	Description
<i>FACTOR.dmx</i>	This entity stores the factor information.
<i>FACTORLINK.dmx</i>	This entity links a factor to an assessment or an outcome plan.
<i>LOCALIZABLETEXT.dmx</i>	This entity holds a link to text translations for descriptions that appear throughout the application.
<i>TEXTTRANSLATION.dmx</i>	This entity holds the text translation for various locales.

Note: `%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

3. From `%CURAM_DIR%\EJBServer`, run **build database**.
4. Save your configuration files.

Factor configuration files for Independent Living

The Independent Living factor configurations files are in the following location in the accelerator.

Table 103: DMX files

File name	Location
<i>FACTOR.dmx</i> <i>FACTORLINK.dmx</i> <i>LOCALIZABLETEXT.dmx</i> <i>TEXTTRANSLATION.dmx</i>	<code>%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial</code>
<p>Note: <code>%CURAM_DIR%</code> is the Cúram installation directory, which by default is <code>C:\Merative\Curam\Development</code>.</p>	

Saving your CDA outcomes to factors mapping configuration files

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the *extractdata* build target.
2. From the `%CURAM_DIR%\EJBServer\build\dataextractor` directory, copy the following DMX files.

File name	Description
<code>DAOUTCOMEFACTORLINK.dmx</code>	This entity stores the relationship between an assessment and a type of case, Outcome Plan for example.

Note: `%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

3. From `%CURAM_DIR%\EJBServer`, run **build database**.
4. Save your configuration files.

CDA outcomes to factors mapping configuration files for Independent Living

The Independent Living CDA outcomes to factors mapping configurations files are in the following location in the accelerator.

Table 104: DMX files

File name	Location
<code>DAOUTCOMEFACTORLINK.dmx</code>	<code>%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial</code>

Note: `%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

Saving your classification configuration files

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the *extractdata* build target.
2. From the `%CURAM_DIR%\EJBServer\build\dataextractor\CODETABLEITEM.dmx` file, search for *AssessDefFactorType*.
`%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.
3. If there is no pre-existing code table in the `%CURAM_DIR%\EJBServer\components\COMPONENT_NAME\codetable` directory, create a new code table for the following code tables. Add the content from the `CODETABLEITEM.dmx` file. If the code table exists, add the content to the existing code table.

Table 105: Code tables files

File name	Description
<code>CT_ClassDivisionType</code>	The file containing the entries for the <code>ClassDivisionType</code> code table.

- From `%CURAM_DIR%\EJBServer`, run **build ctgen database**.
- From `%CURAM_DIR%\webclient`, run **build client**.
- Save your configuration files.

Classification configuration files for Independent Living

Independent Living uses the existing classification codes of Critical, Substantial, and Moderate.

Saving your factor classification configuration files

Extract the specified DMX files from the database and put them under source control.

Procedure

- Extract the DMX files from the database with the `extractdata` build target.
- From the `%CURAM_DIR%\EJBServer\build\dataextractor` directory, copy the following DMX files.

File name	Description
<code>FACTORCLASSIFICATION.dmx</code>	This entity contains measurement indicators of a client's progress for a factor.
<code>CLASSIFICATIONGUIDANCE.dmx</code>	This entity contains a history of guidance for a factor classification.
<code>LOCALIZABLETEXT.dmx</code>	This entity holds a link to text translations for descriptions that appear throughout the application.
<code>TEXTTRANSLATION.dmx</code>	This entity holds the text translation for various locales.

Note: `%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

- From `%CURAM_DIR%\EJBServer`, run **build database**.
- Save your configuration files.

Factor classification configuration files for Independent Living

The Independent Living factor configurations files are in the following location in the accelerator.

Table 106: DMX files

File name	Location
<code>FACTORCLASSIFICATION.dmx</code>	<code>%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial</code>
<code>CLASSIFICATIONGUIDANCE.dmx</code>	
<code>LOCALIZABLETEXT.dmx</code>	<div style="border: 1px solid blue; background-color: #e6f2ff; padding: 5px;"> <p>Note: <code>%CURAM_DIR%</code> is the Cúram installation directory, which by default is <code>C:\Merative\Curam\Development</code>.</p> </div>
<code>TEXTTRANSLATION.dmx</code>	

Saving your case association configuration files

Extract the specified DMX files from the database and put them under source control.

Procedure

1. Extract the DMX files from the database with the *extractdata* build target.
2. From the `%CURAM_DIR%\EJBServer\build\dataextractor` directory, copy the following DMX files.

File name	Description
ASSESSMENTDEFINITIONCASEASSOCIATION.DMX	This entity stores the relationship between an assessment and a type of case, Outcome Plan for example.

Note: `%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

3. From `%CURAM_DIR%\EJBServer`, run **build database**.
4. Save your configuration files.

Case association configuration files for Independent Living

The Independent Living category configurations files are in the following location in the accelerator.

Table 107: DMX files

File name	Location
ASSESSMENTDEFINITIONCASEASSOCIATION.DMX	<code>%CURAM_DIR%\EJBServer\components\IndependentLiving\data\initial</code>

Note: `%CURAM_DIR%` is the Cúram installation directory, which by default is `C:\Merative\Curam\Development`.

Reference

Refer to the following information for specific Independent Living configuration values.

User configuration values for Independent Living

A complete list of the configuration values that you need to configure users in Independent Living.

User values for Independent Living

Specify the following values for creating the assessment planner user for Independent Living.

Table 108: New user values

Name	Value
Title	Mr
First Name	INDEPENDENT LIVING
Last Name	PLANNER
Location	Springfield

Name	Value
Personal Email	financialuser@curamssoftware.com
Username	ilplanner
Password	password
Application	ILAssessmentPlannerHome
Role Name	PLANNERROLE
Account Enabled	True

Assign the assessment planner a position for Independent Living

Specify the following values for assigning the assessment planner user to a position for Independent Living.

Name	Value
Organization Structures	Midway Social Welfare Plan '03
Organization Units	Board of Directors
Position	Chief Executive Officer
Assign User	INDEPENDENT LIVING PLANNER

Workspace banner values for Independent Living

Specify the following values for creating an application for the Independent Living assessment planner workspace section.

Table 109: New application values

Name	Value
ID	ILAPAPP
Component	Cúram
Application	Outcome Planner
Welcome Message	Welcome %user-full-name

Table 110: New application values

Name	Value
Preference Link	True
Logout Link	True
Preference Title	Preferences
Logout Title	Log out

Table 111: Search values

Name	Value
Default Search Page	OutcomePlan_resolveByReference
Initial Text	Enter a Plan Reference Number

Table 112: Sections added

Sections
ILAPAPPHomeSection
ILAPAPPWorkspaceSection
DefaultAppCalendarSection
DefaultAppInboxSection

Pod values for Independent Living

Specify the following values for creating the personalized pods for the Independent Living assessment planner worker.

Name	Value
Page ID	ILAssessmentPlannerHome
User Role	PLANNERROLE
Available Pods	Select the following check boxes: <ul style="list-style-type: none"> • My Next Reviews • My Ongoing Reviews • My Tasks • My Appointments • Quicks Links • Work Queues
Default Pods	Select 'Available Tasks'
Page Layout	3

Quick links values for Independent Living

Specify the following quick links to be displayed on the assessment planner home page quick link pod.

Name	Value
Application	ILAssessmentPlannerHome
Quick Links	Select the following quick links: <ul style="list-style-type: none"> • New Outcome Plan • My Outcome Plans • Outcome Plan Search • Search for a Person • Search for a Case • Search for a Person • Register a Person • My Cases

Home section values for Independent Living

Specify the following values for creating a section for the Independent Living assessment planner home section.

Table 113: New Home section values

Name	Value
Section ID	ILAPAPPHomeSection
Section Title	Home
Default Page ID	ILAssessmentPlannerHome
Hide Tab Container Indicator	True

Table 114: New tab to search for and select

Name	Value
Tab Name	ILAssessmentPlannerHome

Tab values for Independent Living

Specify the following values for creating a tab for the Independent Living assessment planner home page.

Name	Value
ID	ILAssessmentPlannerHome
Name	Home
Title	Home

Workspace section values for Independent Living

Specify the following values for creating a section for the Independent Living assessment planner workspace.

Table 115: New Section values

Name	Value
Section ID	ILAPAPPWorkspaceSection
Section Title	Outcome Plans
Default Page ID	Leave blank.
Hide Tab Container Indicator	Leave the check box blank.

Table 116: New Outcome Plans shortcuts group values

Name	Value
ID	OutcomePlans
Title	Outcome Plans

Table 117: New Outcome Plans link values

Link ID	Page ID	Title
MyOutcomePlans	OutcomePlan_listByOwner	My Outcome Plans
NewOutcomePlan	OutcomePlan_create	New Outcome Plan

Table 118: New Searches shortcuts group values

Name	Value
ID	Searches
Title	Searches

Table 119: New Searches link values

Link ID	Page ID	Title	Open as Modal
OutcomePlanSearch	OutcomePlan_search	Outcome Plan	Yes
PersonSearch	Person_search1	Person	No
CaseSearch	Case_search1	Case	No

Table 120: Search tabs

Search Tabs
OutcomePlanSearch
PersonSearch
CaseSearch

Application data code table values for Independent Living

Specify the following values for linking the assessment planner home page to the application code for Independent Living.

Table 121: New application values

Name	Value
Item Name	ILAssessmentPlannerHome
Technical ID (Code)	ILAPAPP

Custom person home tab navigation values for Independent Living

Specify the additional custom navigation page and associated property that is required for the person home tab navigation for Independent Living.

Additional entry for <i>PersonHome.nav</i>	
<pre><nc:navigation-page id="OutcomePlan" page-id="OutcomePlan_listByParticipant" title="Page.Title.OutcomePlans"/></pre>	
Additional entry for <i>PersonHome.properties</i>	
<pre>Page.Title.OutcomePlans=Outcome Plans</pre>	

Outcome plan values for Independent Living

A complete list of the configuration values that you need to configure outcome plans in Independent Living.

Goal values for Independent Living

Specify the following values for configuring a goal for Independent Living.

Name	Value
Name	Independent Living
Reference	blank
Description	The aim of independent living is to empower and enable people to achieve choice and control over their lives and full participation as equal citizens in society.

Action values for Independent Living

Specify the following values for configuring actions for Independent Living.

Table 122: Actions configured

Name	Description
Advise on Psychiatric Services	Advise on Psychiatric Services. Psychiatric services can be provided where an assessor feels that they are appropriate.
Advise on Secure Care	Advise on Secure Care. Some clients may require secure accommodation and care.
Budgeting Services	Budgeting Services. Help with money management, bill paying etc.
Feeding / Carer Services	Feeding / Carer Services. Feeding is part of general carer services.
Housekeeping Services	Housekeeping Services. This could include cleaning and vacuuming the home. Ensuring that the home is a pleasant environment to live in.
Nursing Services	Nursing services are available where a client has a medical condition that requires qualified nursing care.

Name	Description
Shopping / Carer Services	Shopping / Carer Services. Assisting the client with the shopping list, purchasing the goods and storing them in their proper location in the home where the client can retrieve them.
Toilet / Carer Services	Toilet / Carer Services. Assisting the client in the use of the toilet, ensuring that they are comfortable.
Washing / Carer Services	Washing / Carer Services. Washing, bathing the client is part of general services that a carer would be expected to perform.
Wheelchair Service	Wheelchair Services. The client requires wheelchair assistance to get around.

Table 123: Common configurations across all actions configured for Independent Living

Name	Value
Client Participation	True
Responsibility	User Creating Action
Owner	User Creating Action

Progress values for Independent Living

Specify the following progress values for Independent Living.

Value	Resource Name	Icon
Excellent	ExcellentProgress	<pre>%CURAM_DIR% \EJBServer\components \IndependentLiving \data\initial\blob \ExcellentProgress.png</pre> <div style="border: 1px solid blue; padding: 5px; margin-top: 10px;"> <p>Note: %CURAM_DIR% is the Cúram installation directory, which by default is C:\Merative\Curam\Development.</p> </div>
Good	GoodProgress	<pre>%CURAM_DIR% \EJBServer\components \IndependentLiving \data\initial\blob \GoodProgress.png</pre>
Moderate	ModerateProgress	<pre>%CURAM_DIR% \EJBServer\components \IndependentLiving \data\initial\blob \ModerateProgress.png</pre>
Poor	PoorProgress	<pre>%CURAM_DIR% \EJBServer\components \IndependentLiving \data\initial\blob \PoorProgress.png</pre>

Outcome plan values for Independent Living

Specify the following values for configuring an outcome plan for Independent Living. Multidisciplinary team configurations are not required.

Table 124: Outcome plan

Name	Value
Name	Needs Outcome Plan
Reference	NeedsAssess
Home Page	blank
Goals Applicable To	Outcome Plan Only
Agreement Approval Check	blank
Ownership Strategy	blank
Description	Needs Outcome Plan Description

Table 125: User Creation Options

Name	Value
Create Actions	True
Create Objectives	True
Create Factors	True

Table 126: Review Options

Name	Value
First Review (days)	30
Frequency Calculation	Scheduled Date
Frequency (days)	30

CDA assessment values for Independent Living

A complete list of the configuration values that you need to configure CDA assessment in Independent Living.

Questionnaire values specific for Independent Living

Specify the following values for configuring a questionnaire for Independent Living.

Name	Value
Name	Needs Assessment
Type	Needs
Comments	blank

Data stores values for Independent Living

Specify the following values for configuring new data store entities and attributes for Independent Living.

Table 127: Parent entity values

Name	Value
Name	Application

Table 128: Child entity values

Name	Value
Name	Person
Key Attribute	personID

Table 129: Child entity attribute values

Name	Domain Type
personID	SVR_KEY
firstName	IEG_STRING
gender	IEG_GENDER
dateOfBirth	IEG_DATE
roleID	IEG_INT64
participantID	IEG_INT64
questionsApplicableInd	IEG_BOOLEAN
hasCleanTidyHome	IEG_YES_NO
sufferFromPressureSores	IEG_YES_NO
canManageFinances	IEG_YES_NO
placeIndividualOrOthersAtRisk	IEG_YES_NO
displayDangerousBehaviourToOthers	IEG_YES_NO
canWashSelf	IEG_YES_NO
canFeedSelf	IEG_YES_NO
canGetMedicineFoodHouseholdItems	IEG_YES_NO
requiresAssistanceToToilet	IEG_YES_NO
canWalkLongDistances	IEG_YES_NO

Script properties values for Independent Living

Specify the following values for configuring the script properties for Independent Living.

Name	Value
Quit Page	AssessmentScript_exit
Finish Page	AssessmentDelivery_executeAssessment
Config Properties	ILDA_ieg-config
Show Progress Bar	True
Show Sections	True

Name	Value
Validate Save & Exit	True
Highlight Validation	False
Fast-Path	False
Hide Control Question	False

Section values for Independent Living

Specify the following values for creating the 3 sections that are created for Independent Living.

Table 130: Health and Safety section properties

Name	Value
Title	Health and Safety
Title ID	Section.TitleHealthAndSafety
Enabled	NeedsAssessment_health.png
Disabled	NeedsAssessment_health_disabled.png
Selected	NeedsAssessment_health.png

Table 131: Daily Routine section properties

Name	Value
Title	Daily Routine
Title ID	Section.TitleDailyRoutine
Enabled	NeedsAssessment_routine.png
Disabled	NeedsAssessment_routine_disabled.png
Selected	NeedsAssessment_routine.png

Table 132: Summary section properties

Name	Value
Title	Summary
Title ID	Section.TitleSummary
Enabled	NeedsAssessment_summary.png
Disabled	NeedsAssessment_summary_disabled.png
Selected	NeedsAssessment_summary.png

Question page values for Independent Living

Specify the following question pages for the associated sections that are created for Independent Living.

Table 133: Health and Safety question page properties

The following values are specific for the page, which is created for the Health and Safety section.

Name	Value
Page ID	HealthAndSafetyPage
Entity	Person

Name	Value
Page.Title	Health and Safety
Page Title ID	Group1.Title
Page Description	These questions are related to health and safety and whether the client's state of health compromises their standard of living.
Page Description ID	Group1.Description
Set Focus	True

Table 134: Daily Routine question page properties

The following values are specific for the page, which is created for the Daily Routine section.

Name	Value
Page ID	DailyRoutinePage
Entity	Person
Page.Title	Daily Routine
Page Title ID	Group2.Title
Page Description	These questions are related to daily routine and whether the client requires help performing everyday tasks.
Page Description ID	Group2.Description
Set Focus	True
Progress	50

Summary page values for Independent Living

Specify the following summary page for the associated summary section that is created for Independent Living.

Table 135: Summary page properties

The following values are specific for the page, which is created for the Summary section.

Name	Value
Page ID	SummaryPage
Page.Title	Summary
Page Title ID	Summary.Title
Set Focus	True
Progress	100

Cluster values for Independent Living

Specify the following clusters on the associated pages that are configured for Independent Living.

Table 136: Health and Safety cluster values

The following values are specific for the cluster, which is created for the **Health and Safety** page.

Name	Value
Cluster Title	Health and Safety

Name	Value
Cluster Title ID	Group1.Title

Table 137: Daily Routine cluster values

The following values are specific for the cluster, which is created for the **Daily Routine** page.

Name	Value
Cluster Title	Daily Routine
Cluster Title ID	Group2.Title

Table 138: Summary cluster 1 values

The following values are specific for the first cluster, which is created for the **Summary** page.

Name	Value
Cluster Title	Health and Safety
Cluster Title ID	Group1.Title
Cluster Entity	Person

Table 139: Summary cluster 2 values

The following values are specific for the second cluster, which is created for the **Summary** page.

Name	Value
Cluster Title	Daily Routine
Cluster Title ID	Group2.Title
Cluster Entity	Person

Question values for Independent Living

Specify the following questions inside the clusters that are created for each section that is configured for Independent Living. The help text for each question is displayed at the cluster level within a cluster. The help text is combined for all the questions with the overall help text for the cluster itself to create a help panel within the cluster.

Table 140: Health and Safety cluster question values

The following values are specific for the 5 questions, which are created for the **Health and Safety** cluster on the **Health and Safety** page.

Question Attribute	Mandatory	Question Label	Question Label ID	Question Help Text	Question Help Text ID
hasCleanTidyHome	True	Is the home clean and tidy?	Q1.Label	Is the home tidy and are kitchen utensils clean?	Q1.HelpText

Question Attribute	Mandatory	Question Label	Question Label ID	Question Help Text	Question Help Text ID
sufferFromPressureSores	True	Does the client suffer from pressure sores?	Q2.Label	Pressure sores are areas of damaged skin that is caused by staying in one position for too long. You are at risk if you are bedridden, use a wheelchair, or are unable to change your position.	Q2.HelpText
canManageFinancials	True	Is the client able to manage their own financial affairs?	Q3.Label	Can the client manage paying bills, look after their money and budget?	Q3.HelpText
placeIndividualOrOthersAtRisk	True	Does the client's lifestyle place them or others at risk?	Q4.Label	An example might be where client drives a car but has poor vision.	Q4.HelpText
displayDangerousBehaviourToOthers	True	Does the client display dangerous behavior towards others?	Q5.Label	Client threatens people or is verbally abusive.	Q5.HelpText

Table 141: Daily Routine cluster question values

The following values are specific for the 5 questions, which are created for the **Daily Routine** cluster on the **Daily Routine** page.

Question Attribute	Mandatory	Question Label	Question Label ID	Question Help Text	Question Help Text ID
canWashSelf	True	Can the client wash themselves?	Q6.Label	Is the client capable of taking a bath or shower without assistance?	Q6.HelpText
canFeedSelf	True	Can the client feed themselves?	Q7.Label	Is the client capable of feeding themselves or do they require assistance?	Q7.HelpText

Question Attribute	Mandatory	Question Label	Question Label ID	Question Help Text	Question Help Text ID
canGetMedicineFoodHouseholdItems	True	Can the client obtain food, medicines, and household items?	Q8.Label	Is the client capable of doing their own shopping? This includes preparing shopping lists, getting to and from the shops, and managing money.	Q8.HelpText
requiresAssistanceToilet	True	Can the client access the toilet without assistance?	Q9.Label	Is the client capable of going to and from, and using, the toilet without assistance?	Q9.HelpText
canWalkLongDistances	True	Can the client walk long distances without assistance?	Q10.Label	Client cannot walk long distances without tiring quickly.	Q10.HelpText

Table 142: Summary cluster 1 question values

The following values are specific for the 5 questions, which are created for the first **Summary** cluster on the **Summary** page.

Question Attribute	Mandatory	Question Label	Question Label ID	Question Help Text	Question Help Text ID
hasCleanTidyHome	True	Is the home clean and tidy?	Q1.Label	Is the home tidy and are kitchen utensils clean?	Q1.HelpText
sufferFromPressureSores	True	Does the client suffer from pressure sores?	Q2.Label	Pressure sores are areas of damaged skin that is caused by staying in one position for too long. You are at risk if you are bedridden, use a wheelchair, or are unable to change your position.	Q2.HelpText
canManageFinancials	True	Is the client able to manage their own financial affairs?	Q3.Label	Can the client manage paying bills, look after their money and budget?	Q3.HelpText

Question Attribute	Mandatory	Question Label	Question Label ID	Question Help Text	Question Help Text ID
placeIndividualOrOthersAtRisk	True	Does the client's lifestyle place them or others at risk?	Q4.Label	An example might be where client drives a car but has poor vision.	Q4.HelpText
displayDangerousBehaviourToOthers	True	Does the client display dangerous behavior towards others?	Q5.Label	Client threatens people or is verbally abusive.	Q5.HelpText

Table 143: Summary cluster 2 question values

The following values are specific for the 5 questions, which are created for the second **Summary** cluster on the **Summary** page.

Question Attribute	Mandatory	Question Label	Question Label ID	Question Help Text	Question Help Text ID
canWashSelf	True	Can the client wash themselves?	Q6.Label	Is the client capable of taking a bath or shower without assistance?	Q6.HelpText
canFeedSelf	True	Can the client feed themselves?	Q7.Label	Is the client capable of feeding themselves or do they require assistance?	Q7.HelpText
canGetMedicineFoodHouseholdItems	True	Can the client obtain food, medicines, and household items?	Q8.Label	Is the client capable of doing their own shopping? This includes preparing shopping lists, getting to and from the shops, and managing money.	Q8.HelpText
requiresAssistanceToToilet	True	Can the client access the toilet without assistance?	Q9.Label	Is the client capable of going to and from, and using, the toilet without assistance?	Q9.HelpText
canWalkLongDistances	True	Can the client walk long distances without assistance?	Q10.Label	Client cannot walk long distances without tiring quickly.	Q10.HelpText

Cluster layout values for Independent Living

Specify the following values for configuring the cluster layout for the needs assessment IEG script for Independent Living.

Table 144: Cluster layout values

Name	Value
Layout Type	flow
Num Cols	blank
Label Width	70
Label Alignment	right
Cluster Width	blank

Outcome values for the needs assessment matrix for Independent Living

Specify the following values for configuring an outcome for the needs assessment matrix for Independent Living.

Table 145: Daily Routine outcome values

Name	Value
Name	Daily Routine
Type	Needs
Start Date	3/1/2015
End Date	blank
Comments	blank

Table 146: Health and Safety outcome values

Name	Value
Name	Health and Safety
Type	Needs
Start Date	4/1/2015
End Date	blank
Comments	blank

Decision assist outcome factor values Independent Living

Specify the following values when associating decision assist outcomes with factors for Independent Living.

Table 147: Daily Routine outcome values

Name	Value
Outcome	Daily Routine
Classification	Moderate

Table 148: Health and Safety outcome values

Name	Value
Outcome	Health and Safety
Classification	Moderate

Assessment configuration values for Independent Living

Specify the following assessment configuration values for Independent Living.

Table 149: CDA assessment configuration values

Name	Value
Name	Needs Assessment Config
Question Script	Needs Assessment Questionnaire

CDA matrix values for Independent Living

Complete the following values for configuring a CDA matrix for Independent Living.

Name	Value
Name	Needs Assessment Matrix
Type	Needs
Scoring By Outcome	Yes
Multiple Outcomes	Yes
Comments	blank

Matrix values for Independent Living

Specify the following values to be configured a new matrix for Independent Living.

Table 150: Question selected

Select all 10 questions to be included in the CDA matrix.

Questions
Is the home clean and tidy?
Does the client suffer from pressure sores?
Is the client able to manage their own financial affairs?
Does the client's lifestyle place them or others at risk?
Does the client display dangerous behavior towards others?
Can the client wash themselves?
Can the client feed themselves?
Can the client obtain food, medicines, and household items?
Can the client access the toilet without assistance?
Can the client walk long distances without assistance?

Table 151: Outcomes selected

Select the following outcome to be included in the CDA matrix.

Outcomes
Health and Safety
Daily Routine

Table 152: Options selected

Select the following option to be included in the CDA matrix.

Options
Scores

Matrix score values for Independent Living

Specify the following scores for the Yes/No answers and the different combinations for each question.

Table 153: Health and Safety questions score values

Question Number	Question	Answers	Scores
Q1	Is the home clean and tidy?	Yes	0
		No	1
Q2	Does the client suffer from pressure sores?	Yes	2
		No	0
Q3	Is the client able to manage their own financial affairs?	Yes	0
		No	4
Q4	Does the client's lifestyle place them or others at risk?	Yes	8
		No	0
Q5	Does the client display dangerous behavior towards others?	Yes	16
		No	0

Table 154: Daily Routine questions score values

Question Number	Question	Answers	Scores
Q6	Can the client wash themselves?	Yes	0
		No	1
Q7	Can the client feed themselves?	Yes	0
		No	2
Q8	Can the client obtain food, medicines, and household items?	Yes	0
		No	4
Q9	Can the client access the toilet without assistance?	Yes	0
		No	8
Q10	Can the client walk long distances without assistance?	Yes	0
		No	16

Table 155: Health and Safety questions answer combination (C) values

Ques Num	Ar	C1	C2	C3	C4	C5	C6	C7	C8	C9	C10	C11	C12	C13	C14	C15	C16	C17	C18	C19	C20	C21	C22	C23	C24	C25	C26	C27	C28	C29	C30	C31	C32						
Q1	Yes	True																																					
	No																																						
Q2	Yes	True																																					
	No																																						
Q3	Yes	True																																					
	No																																						
Q4	Yes	True																																					
	No																																						
Q5	Yes	True																																					
	No																																						

Table 156: Daily Routine questions answer combination (C) values

Ques Num	Ar	C1	C2	C3	C4	C5	C6	C7	C8	C9	C10	C11	C12	C13	C14	C15	C16	C17	C18	C19	C20	C21	C22	C23	C24	C25	C26	C27	C28	C29	C30	C31	C32							
Q6	Yes	True																																						
	No																																							
Q7	Yes	True																																						
	No																																							
Q8	Yes	True																																						
	No																																							
Q9	Yes	True																																						
	No																																							
Q10	Yes	True																																						
	No																																							

Assessment values for Independent Living

A complete list of the configuration values that you need to configure assessment in Independent Living.

Assessment definition values for Independent Living

Specify the following values for configuring an assessment definition for Independent Living.

Table 157: Assessment definition values

Name	Value
Name	Needs Assessment
Reference	NeedsAssessment
Start Date	Current date
Reassessment Warning Days	5
Assessment Interval Days	90
Assessment Configuration	Needs Assessment Config

Name	Value
Type	Role based
Role Change Allowed	Yes
Reassessment Allowed	Yes
Display Graphs	Yes
Graph By	Graph by Classification
Graph Type	Bar
Priorities Applicable	Yes
Display Guidance	Yes
Group Results By Category	No
Display Score	Yes
Guidance Result Cluster	Closed
Factor Display Text	Needs Assessed
Count Same Score As One Priority	No
Result Page	AssessmentDelivery_viewResultsForInstance

Assessment role values for Independent Living

Specify the following values for configuring an assessment definition role for Independent Living.

Table 158: Assessment definition role values

Name	Value
Type	Claimant Role
Type Abbreviation	Claim Role
Reference	blank
Mandatory	Yes
Multiple Clients	No
Questions Applicable	Yes

Categories specified for Independent Living

The categories that are used for Independent Living are defined in an existing *CT_AssessDefFactorType.ctx* code table therefore no new code table configurations are required. The *Need* category is the only category that is selected during the assessment definition category creation for Independent Living.

Classification code table values for Independent Living

Specify the following values for configuring an Classification Division Type code table for Independent Living.

Table 159: Classification division type code table search criteria

Name	Value
Search Criteria Name	ClassDivisionType

Table 160: Classification division type code table new item values

Name	Description	Code 1 Value	Code 2 Value	Code 3 Value
Item Name	The item name which is displayed in the drop-down list on the Classification Division Type window.	Critical	Substantial	Moderate
Technical ID (Code)	The code for the item.	CDT24000	CDT24001	CDT24002

Category classification values for Independent Living

There are 3 classifications that are configured for Independent Living. Specify the following values for configuring the 3 classifications for the Need category.

Table 161: New category classifications values

Category	Classification
Need	Critical
Need	Substantial
Need	Moderate

Factor values for Independent Living

Specify the following values for configuring 2 assessment definition factors for Independent Living.

Table 162: Needs Assessment factors configured

Name	Description
Assess Needs under Health and Safety	Health and Safety. Includes freedom from harm, abuse or neglect, and taking account of wider issues of housing and community safety.
Management of Daily Routine	Management of daily routine; the ability to manage personal and other daily routines.

Table 163: The 5 factor values

Name	Value
Start Date	Current date
Category	Need
Planning Applicable	Yes

Decision assist outcome factor mapping values for Independent Living

Specify the following values when associating decision assist outcomes with factors for Independent Living.

Table 164: Daily Routine outcome values

Name	Value
Outcome	Daily Routine - Needs

Table 165: Health and Safety outcome values

Name	Value
Outcome	Health and Safety - Needs

Classification values for Independent Living

Specify the following values for configuring the 3 classifications for a factor.

Table 166: Critical classification configuration values

Name	Value
Minimum Range	16
Maximum Range	31
Hide from Priority Selection	No
Definition	Critical
Guidance Text	Factor 2: Critical 16-31. There is an inability to carry out vital personal care or domestic routines. Without the provision of community care services, there would be a breakdown of care or living arrangements, or they would become unsafe. There would also be a risk of significant harm, neglect, or abuse.

Table 167: Substantial classification configuration values

Name	Value
Minimum Range	8
Maximum Range	15
Hide from Priority Selection	No
Definition	Substantial
Guidance Text	Factor 2: Substantial 8-15. There is an inability to carry out most of essential personal care or domestic routines. A person needs daily or continuous help and support with essential activities of daily living. In particular whose care or living arrangements break down or become unsafe without provision of community care services. A person who is unable to manage their own essential activities of daily living without the provision of community care services to support them to sustain their caring role.

Table 168: Moderate classification configuration values

Name	Value
Minimum Range	1
Maximum Range	7
Hide from Priority Selection	No
Definition	Moderate
Guidance Text	Factor 2: Moderate 1-7. There is an inability to carry out several personal care or domestic routines. A person who is, or will be in the foreseeable future, unable to manage most of activities of daily living. Or other daily routines and sustain their caring role, without the provision of care services. People who need some support or assistance to manage independently each week, but less often than every day.

Classification subdivision values for Independent Living

Specify the following values for configuring the subdivision classifications specific for the 2 factors that are created for Independent Living.

Table 169: Critical classification subdivisions

Range	Factor 1 - Health and Safety - Guidance	Factor 2 - Daily Routine - Guidance
16 to 16	Factor 1: Critical 16. Client in need of advice on psychiatric service	Factor 2: Critical 16. Client requires a wheelchair to get around.
17 to 17	Factor 1: Critical 17. Client in need of advice on psychiatric services and provision of housekeeping services.	Factor 2: Critical 17. Client requires a wheelchair and assistance feeding.
18 to 18	Factor 1: Critical 18. Client in need of advice on psychiatric services and provision of nursing services.	Factor 2: Critical 18. Client requires a wheelchair and assistance washing.
19 to 19	Factor 1: Critical 19. Client in need of advice on psychiatric services and the provision of housekeeping and nursing services.	Factor 2: Critical 19. Client requires a wheelchair and assistance feeding and washing.
20 to 20	Factor 1: Critical 20. Client in need of advice on psychiatric services and the provision of budgeting services.	Factor 2: Critical 20. Client requires a wheelchair and assistance shopping.
21 to 21	Factor 1: Critical 21. Client in need of advice on psychiatric services and the provision of household and budgeting services.	Factor 2: Critical 21. Client requires a wheelchair and assistance feeding and shopping.
22 to 22	Factor 1: Critical 22. Client in need of advice on psychiatric services and the provision of nursing and budgeting services.	Factor 2: Critical 22. Client requires a wheelchair and assistance washing and shopping.

Range	Factor 1 - Health and Safety - Guidance	Factor 2 - Daily Routine - Guidance
23 to 23	Factor 1: Critical 23. Client in need of advice on psychiatric services and the provision of housekeeping, nursing, and budgeting services.	Factor 2: Critical 23. Client requires a wheelchair and assistance feeding, washing, and shopping.
24 to 24	Factor 1: Critical 24. Client in need of advice on psychiatric services and secure care.	Factor 2: Critical 24. Client requires a wheelchair and assistance using the toilet.
25 to 25	Factor 1: Critical 25. Client in need of advice on psychiatric services and secure care, and the provision of housekeeping services.	Factor 2: Critical 25. Client requires a wheelchair and assistance with feeding and using the toilet.
26 to 26	Factor 1: Critical 26. Client in need of advice on psychiatric services and secure care, and the provision of nursing services.	Factor 2: Critical 26. Client requires a wheelchair and assistance with washing and using the toilet.
27 to 27	Factor 1: Critical 27. Client in need of advice on psychiatric services and secure care, and the provision of housekeeping, nursing, and budgeting services.	Factor 2: Critical 27. Client requires a wheelchair and assistance with feeding, washing and using the toilet.
28 to 28	Factor 1: Critical 28. Client in need of advice on psychiatric services and secure care, and provision of budgeting services.	Factor 2: Critical 28. Client requires a wheelchair and assistance with shopping and using the toilet.
29 to 29	Factor 1: Critical 29. Client in need of advice on psychiatric services and secure care, and the provision of housekeeping and budgeting services.	Factor 2: Critical 29. Client requires a wheelchair and assistance with feeding, shopping and using the toilet.
30 to 30	Factor 1: Critical 30. Client in need of advice on psychiatric services and secure care, and the provision of nursing and budgeting services.	Factor 2: Critical 30. Client requires a wheelchair and assistance with washing, shopping and using the toilet.

Table 170: Substantial classification subdivisions

Range	Factor 1 - Health and Safety - Guidance	Factor 2 - Daily Routine - Guidance
8 to 8	Factor 1: Substantial 8. Provide client with advice on secure care facilities.	Factor 2: Substantial 8. Client needs assistance using toilet.
9 to 9	Factor 1: Substantial 9. Provide client with advice on secure care and provide housekeeping services.	Factor 2: Substantial 9. Client needs assistance with feeding and using toilet.
10 to 10	Factor 1: Substantial 10. Provide client with advice on secure care and provide nursing services.	Factor 2: Substantial 10. Client needs assistance with washing and using toilet.

Range	Factor 1 - Health and Safety - Guidance	Factor 2 - Daily Routine - Guidance
11 to 11	Factor 1: Substantial 11. Provide client with advice on secure care, and provide housekeeping and nursing services.	Factor 2: Substantial 11. Client needs assistance with feeding, washing and using toilet.
12 to 12	Factor 1: Substantial 12. Provide client with advice on secure care, and provide budgeting services.	Factor 2: Substantial 12. Client needs assistance with shopping and using toilet.
13 to 13	Factor 1: Substantial 13. Provide client with advice on secure care, and provide budgeting and housekeeping services.	Factor 2: Substantial 13. Client needs assistance with feeding, shopping and using toilet facilities.
14 to 14	Factor 1: Substantial 14. Provide client with advice on secure care, and provide budgeting and nursing services	Factor 2: Substantial 14. Client needs assistance with washing, shopping and using toilet facilities.
15 to 15	Factor 1: Substantial 15. Provide client with advice on secure care, and provide budgeting, nursing and housekeeping services.	Factor 2: Substantial 15. Client needs assistance with feeding, washing, shopping and using toilet facilities.

Table 171: Moderate classification subdivisions

Range	Factor 1 - Health and Safety - Guidance	Factor 2 - Daily Routine - Guidance
1 to 1	Factor 1: Moderate 1. Client may need housekeeping services.	Factor 2: Moderate 1. Client needs assistance with feeding.
2 to 2	Factor 1: Moderate 2. Client may need nursing services.	Factor 2: Moderate 2. Client needs assistance with washing.
3 to 3	Factor 1: Moderate 3. Client may need housekeeping and nursing services.	Factor 2: Moderate 3. Client needs assistance with feeding and washing.
4 to 4	Factor 1: Moderate 4. Client may need budgeting services.	Factor 2: Moderate 4. Client needs assistance with shopping.
5 to 5	Factor 1: Moderate 5. Client may need housekeeping and budgeting services.	Factor 2: Moderate 5. Client needs assistance with feeding and shopping.
6 to 6	Factor 1: Moderate 6. Client may need nursing and budgeting services.	Factor 2: Moderate 6. Client needs assistance with washing and shopping.
7 to 7	Factor 1: Moderate 7. Client may require housekeeping, nursing and budgeting services.	Factor 2: Moderate 7. Client needs assistance with feeding, washing and shopping.

Recommendation values for Independent Living

For Independent Living, the recommendations are configured as part of configuring a subdivision recommendation.

Health and safety factor subdivision recommendation values for Independent Living

Specify the following values for configuring subdivision action recommendations for Independent Living. The action recommendations are not linked to programs for Independent Living.

To give you an example of how the logic (rules) is defined for Independent Living for the first 3 questions that are specified in the assessment. Open up the Needs Assessment Matrix to see the scores that are specified for each question.

If the client specifies "No" to question 1 "Is the home clean and tidy", you see from table 2 that housekeeping services are recommended. You see in the Needs Assessment Matrix that the score is 1 if the client specifies "No".

For question 2, if the client specifies "Yes" to question 2 "Does the client suffer from pressure scores", nursing services are recommended. You see in the Needs Assessment Matrix that the score is 2 if the client specifies "No".

If 3 is the final score that is achieved by the client assessment, you see that for range 3 to 3 that housekeeping services and nursing services are recommended.

Table 172: Action configurations

Activity	Activity Type	Recommendation	Reason
Advise on Psychiatric Services	Action	Advised	Advise on Psychiatric Services Recommendation
Budgeting Services	Action	Advised	Budgeting Services Recommendation
Housekeeping Services	Action	Advised	Housekeeping Services Recommendation
Nursing Services	Action	Advised	Nursing Services Recommendation
Advise on Secure Care	Action	Advised	Advise on Secure Care Recommendation

Table 173: Moderate classification subdivision recommendations

Range	Budgeting Services	Housekeeping Services	Nursing Services
1 to 1	No	Yes	No
2 to 2	No	No	Yes
3 to 3	No	Yes	Yes
4 to 4	Yes	No	No
5 to 5	Yes	Yes	No
6 to 6	Yes	No	Yes
7 to 7	Yes	Yes	Yes

Table 174: Substantial classification subdivision recommendations

Range	Budgeting Services	Housekeeping Services	Nursing Services	Advise on Secure Care
8 to 8	No	No	No	Yes
9 to 9	No	Yes	No	Yes
10 to 10	No	No	Yes	Yes
11 to 11	No	Yes	Yes	Yes
12 to 12	Yes	No	No	Yes
13 to 13	Yes	Yes	No	Yes
14 to 14	Yes	No	Yes	Yes
15 to 15	Yes	Yes	Yes	Yes

Table 175: Critical classification subdivision recommendations

Range	Advise on Psychiatric Services	Budgeting Services	Housekeeping Services	Nursing Services	Advise on Secure Care
16 to 16	Yes	No	No	No	No
17 to 17	Yes	No	Yes	No	No
18 to 18	Yes	No	No	Yes	No
19 to 19	Yes	No	Yes	Yes	No
20 to 20	Yes	Yes	No	No	No
21 to 21	Yes	Yes	Yes	No	No
22 to 22	Yes	Yes	No	Yes	No
23 to 23	Yes	Yes	Yes	Yes	No
24 to 24	Yes	No	Yes	No	Yes
25 to 25	Yes	No	No	Yes	Yes
26 to 26	Yes	No	Yes	Yes	Yes
27 to 27	Yes	No	Yes	Yes	Yes
28 to 28	Yes	Yes	No	No	Yes
29 to 29	Yes	Yes	Yes	No	Yes
30 to 30	Yes	Yes	No	Yes	Yes

Daily routine factor subdivision recommendation values for Independent Living

Specify the following values for configuring subdivision action recommendations for Independent Living. The action recommendations are not linked to programs for Independent Living.

Table 176: Action configurations

Activity	Activity Type	Recommendation	Reason
Feeding / Carer Services	Action	Advised	Feeding / Carer Services Recommendation

Activity	Activity Type	Recommendation	Reason
Washing / Carer Services	Action	Advised	Washing / Carer Services Recommendation
Shopping / Carer Services	Action	Advised	Shopping / Carer Services Recommendation
Toilet / Carer Services	Action	Advised	Toilet / Carer Services Recommendation
Wheelchair Service	Action	Advised	Wheelchair Service Recommendation

Table 177: Moderate classification subdivision recommendations

Range	Feeding / Carer Services	Washing / Carer Services	Shopping / Carer Services
1 to 1	Yes	No	No
2 to 2	No	Yes	No
3 to 3	Yes	Yes	No
4 to 4	No	No	Yes
5 to 5	Yes	No	Yes
6 to 6	No	Yes	Yes
7 to 7	Yes	Yes	Yes

Table 178: Substantial classification subdivision recommendations

Range	Feeding / Carer Services	Washing / Carer Services	Shopping / Carer Services	Toilet / Carer Services
8 to 8	No	No	No	Yes
9 to 9	Yes	No	No	Yes
10 to 10	No	Yes	No	Yes
11 to 11	Yes	Yes	No	Yes
12 to 12	No	No	Yes	Yes
13 to 13	Yes	No	Yes	Yes
14 to 14	No	Yes	Yes	Yes
15 to 15	Yes	Yes	Yes	Yes

Table 179: Critical classification subdivision recommendations

Range	Feeding / Carer Services	Washing / Carer Services	Shopping / Carer Services	Toilet / Carer Services	Wheelchair Service
16 to 16	No	No	No	No	Yes
17 to 17	Yes	No	No	No	Yes
18 to 18	No	Yes	No	No	Yes
19 to 19	Yes	Yes	No	No	Yes
20 to 20	No	No	Yes	No	Yes

Range	Feeding / Carer Services	Washing / Carer Services	Shopping / Carer Services	Toilet / Carer Services	Wheelchair Service
21 to 21	Yes	No	Yes	No	Yes
22 to 22	No	Yes	Yes	No	Yes
23 to 23	Yes	Yes	Yes	No	Yes
24 to 24	No	No	No	Yes	Yes
25 to 25	Yes	No	No	Yes	Yes
26 to 26	No	Yes	No	Yes	Yes
27 to 27	Yes	Yes	No	Yes	Yes
28 to 28	No	No	Yes	Yes	Yes
29 to 29	Yes	No	Yes	Yes	Yes
30 to 30	No	Yes	Yes	Yes	Yes

Assessment definition case association for Independent Living

Associate the assessment definition with the following Outcome Plan. Configure the assessment to be displayed on the Outcome Plan home page and that the assessment can be run from within the outcome plan.

Table 180: Assessment Definition Outcome Plan Link

Type	Name	Assessment Available From	On Home Page
Outcome Plan	Needs Outcome Plan	Plan	Yes

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