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Cúram 8.1.3

Outcome Management Configuration Guide

Note

Before using this information and the product it supports, read the information in

Edition

This edition applies to Cúram 8.1, 8.1.1, 8.1.2, and 8.1.3.

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Contents

1 Configuring Outcome Management

Use this information to configure assessments and outcome plans. The assessment definition is an administrative template for individual assessments. Outcome planning can be configured to address and manage the needs that are identified during assessment.

Purpose

The following pages describe the configuration options available in Outcome Management to configure assessments and outcome plans. It includes descriptions of how an assessment must be configured before it can be used to identify client needs and also describes the tools that can be used to derive assessment results. It also includes details of how outcome planning can be configured which allows for structured outcome management to address and manage the needs identified during assessment. Two appendices outline a step by step approach to creating a simple assessment using CDA and CER.

Audience

The target audiences is administrators who are responsible for configuring the Outcome Management components. It is assumed that the administrators have worked with code tables, application properties, and system security as part of Cúram system administration.

Prerequisites

Before you use the following pages, you must be familiar with the related link.

1.1 Configuring assessments

Assessments overview

Each assessment that is run is configured in administration as an assessment definition. An assessment definition is the template on which an individual assessment is based. The following information can be recorded for an assessment definition after it is configured:

- The categories applicable to the assessment.
- The factors that are assessed as part of the assessment.
- The classifications for factors that are assessed.
- The roles that clients can play in the assessment.
- Additional classification configurations for individual factors.
- Activity recommendations for factor classifications.
- Associations between assessments and case types.

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 Assessment Definition...**.

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. |

Name	Description
Group Name	The localizable name of the group to be displayed when the group-based assessments are configured.
Role Change Allowed	Specifies whether the roles defined for the assessment can be changed on reassessment.
	When role changes are allowed, the **Select Clients and Roles** page is displayed during reassessment and the caseworker can change the assessment roles.
	When role changes are not allowed, the **Select Clients and Roles** page is not displayed during reassessment.
	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.
Reassessment Allowed	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.
	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.
	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.
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.

Name	Description
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.
Display Score	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.
	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.
Guidance Result Cluster	Holds the identifier that indicates whether the guidance result cluster is to be displayed by default as open or closed.
Factor Display Text	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.
Classification Display Text	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.
Count Same Score As One Priority	Indicates whether the same factor score that is achieved by more than one client can be counted as a single priority factor.
Result Page	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.
Security Identifiers	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.

Name	Description
Categories	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.

3. Click **Save**.

Associating CDA Or CER With An Assessment Definition

Each assessment definition uses an IEG script combined with either a Cúram Decision Assist (CDA) matrix or a Cúram Eligibility Rule set (CER) to derive the assessment results. The Assessment Configuration drop-down list is used to indicate if the assessment results will be derived using the CDA matrix or a CER rule set. The decision on whether to use a CDA matrix or a CER rule set depends on the complexity of the assessment.

CER can be used for more complex assessments where deriving the assessment results requires rules processing. For example, a Risk Assessment has two factors, Neglect and Abuse. Neglect is classified using classifications of Low (-1 to 1), Moderate (2 to 5), High (6 to 8) and Very High (9+). Abuse is classified using classifications of Low (-1 to 0), Moderate (1 to 3), High (4 to 6) and Very High (7+). The assessment produces a risk level which is derived from the highest of the classifications for Neglect and Abuse i.e. If the household 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. In addition, this Risk Assessment allows for overrides whereby the user can override the assessment results. CER is required to implement the override processing for this assessment.

CDA can be used for assessments where results can be derived without rules processing. For example, a Care Giver Strength and Needs (CSN) assessment contains nine factors. Each factor has one question with four possible answers. The assessment result for each factor is derived from the answer provided by a user.

> **Note:** A new CDA or CER assessment can be added to this list during CDA and CER administration. See 1.4 Configuring CDA assessments on page 57, which outlines a step by step example of how CDA is used to derive assessment results. See Appendix B, Configuring a CER Assessment which outlines a step by step example of how CER is used to derive assessment results.

Define whether assessment is group- or role-based

Administrators can specify whether an assessment definition is group- or role-based by using the **Type** list. When the **Group Based** option is selected, the questions asked during the assessment are specific to a group of clients, such as a household. When the **Role Based** option is selected, the questions that are asked are specific to the roles defined for the assessment definition. For group-based assessments, the name of the group must also be specified. A configuration option is provided that allows administrators to specify whether the assessment questions are applicable to each role on the assessment or to specific roles only. Configuring an assessment role on page 24 describes this option. When the **Questions Applicable** option is set on the role and the **Role Based** option is selected for an assessment definition, the assessment questions are asked of the roles defined for the assessment definition.

Some assessments that have group and role characteristics require results to be displayed for both a group of clients and for individual clients. For such assessments, some factors are group-based where results are included for a group of clients and other factors are role-based where results for individual clients are included. The assessment framework supports the display of such results by displaying factors with results for a group of clients in one list and displaying factors with results for individual clients in another list.

For example, the Reunification assessment consists of four parts and has results for each part, some of which are for a group of clients and others that are for individual clients. The four parts are Risk, Visitation, Safety, and Placement and results are determined for each part so four factors are configured to represent the results. The Risk and Safety factors produce results for a group of clients and the Visitation and Placement factors produce results for clients that satisfy the child role. So the assessment results display the results for Risk and Safety factors together and the results for Visitation and Placement factors together.

For such assessments that have group and role characteristics, the results page must be specified as `AssessmentDelivery_viewCombinedResultsForInstance`. This page displays the factor for a client if an associated case participant ID exists. If no associated case participant ID is included, the page displays the factor for the group.

Decide whether reassessment is allowed
You must decide whether reassessment is appropriate for the assessment.

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 once.

When the reassessment setting 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. If the setting is not selected, a reassessment cannot be run.

If the reassessment setting is not selected, the reassess option is not displayed on the assessment home page and the assessment cannot be reassessed.

Graph Configurations

A number of configuration settings can be specified that determine how the assessment results are graphed. This section describes the configuration options that are available for graphing assessment results.

Decide on how to display the assessment results
You must decide how to display the assessment results for each client that is assessed by using graphs or as a standard list. The assessment results are displayed on the assessment results page and the assessment home page.

The graph provides a view of results, for each client, across all of the factors that are defined for the assessment, for example, substance abuse, domestic violence, social support.

The scores that are obtained per factor are displayed on the y-axis of the graph. The graph can be configured to display either scores or classifications on the y-axis. Selecting an individual tab, such as substance abuse, displays the clients' assessment results for that specific factor on a graph.

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.

If you choose to display the results in a graph, you must also decide which type of graph to use. Two types of graphs are available to display assessment results - a radar graph and a bar graph.

Defining Whether To Graph By Classification Or Score

Administrators can graph assessment results by classification or score. When the Graph by Classification option is selected, the classifications that are defined for the assessment are displayed on the y-axis of the graph. When the Graph by Score option is selected, the range of scores defined for the assessment is displayed on the y-axis.

The order in which these classifications are displayed on the graph is configurable. See for more information.

> **Note:** The options available for selection in the Graph By field are defined in the AssessmentDefGraphBy code table. A new graph by value can be dynamically added to this code table and published as part of system administration.

Defining The Type Of Graph

Two types of graph are available for selection when displaying assessment results - a radar graph and a bar graph. The Graph Type drop down list can be used to specify the type of graph to be used when displaying results on the assessment results page and the assessment home page. A user also has the option to change the type of graph at runtime.

> **Note:** The options available for selection in the Graph Type field are defined in the AssessmentDefGraphType code table. A new graph type can be dynamically added to this code table and published as part of system administration.

Application properties for configuring colors in graphs

The application property curam.assessmentplanning.graphRGBColors indicates the colors of the graphs displayed in the assessment results page and the assessment home page. The application property curam.assessmentplanning.progressGraphRGBColor indicates the colors of the graphs displayed on the progress graphs for each factor.

The values of these properties are set by entering a comma-delimited list of Red Green Blue (RGB) color codes.

The values of these properties are set by entering a comma-delimited list of Red Green Blue (RGB) color codes. .

The default values for curam.assessmentplanning.graphRGBColors are B99CCA, 80C975, F2788E, 6A9DBD, F8B865, 98D7DA, and F79BC9.The default values for curam.assessmentplanning.graphRGBColors are 6929C4, 1192E8, 005D5D, 9F1853, FA4D56,

520408, and 198038. The default value for curam.assessmentplanning.progressGraphRGBColor is 3BAFE2.

Decide whether escalation of assessment results is required

You must decide whether priority selection is needed to escalate the most urgent assessment results to the caseworker.

Priority selection is used to ensure that the most pressing or urgent assessment results are dealt with by a caseworker. When the selection is set, a check box is displayed beside each factor for which a client was assessed on the assessment results page. The caseworker can select each factor that is considered a priority from this list. For example, a caseworker might prioritize the factors for which the client scored the lowest results. If the Priorities Applicable indicator is not selected, the priority selection check boxes are not displayed in the caseworker application.

You must also decide whether you want to hide particular results from priority selection or a particular result for selected factors from the priority selection list.

Configuration settings are available that allow an administrator to hide particular results from priority selection and to hide a particular result for selected factors from the priority selection list. For more information, see Configuring a factor classification on page 30

Two configuration settings are also available that allow a minimum and maximum number of priority factors to be specified for each classification. For more information, see Configuring a factor on page 27

Grouping Results List by Category

The assessment results list that is displayed on the assessment results page can either be grouped by classification or by category defined for the assessment definition. The assessment results list can only be grouped by category or by classification when a single category is defined for an assessment definition. See Categories on page 20 for more information on configuring categories. See Classifications on page 21 for more information on configuring classifications.

When the Group Results by Category indicator is selected and a single category is defined, the results are displayed in one list.

When the Group Results by Category indicator is not selected, a single priority list is displayed for each classification achieved in the assessment results.

If multiple categories are defined for the assessment definition, the Group Results by Category indicator is not applicable and the priority selection list is always grouped by category. The assessment results list will not be grouped by classification if multiple categories are defined for the assessment definition. For example, two categories are defined: Need and Barrier. Therefore, two separate assessment results lists are displayed: one list for the Need factors and one list for the Barrier factors.

Decide whether to display guidance

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.

Guidance is guideline text or help text that is used to assist 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.

The guidance can be displayed on the assessment results page and a guidance tab is displayed on the assessment home page. Clicking the guidance tab displays the guidance text that is defined for a factor classification or factor classification sub division.

If you choose to display guidance, you must decide whether the guidance results cluster displayed on the assessment results page is open or closed when the assessment results are displayed. When the guidance results cluster is set to 'Open', the cluster is automatically expanded when the assessment results are displayed. The cluster allows the caseworker to see all of the guidance text that is defined for a factor classification or factor classification subdivision.

When the guidance results cluster is set to 'Closed', the guidance text that is defined for the factor classification or factor classification sub division is hidden when the assessment results are displayed. The caseworker must manually expand the cluster to view the guidance text.

Your decision to open or close the guidance results cluster depends on the amount of guidance text that is defined for an assessment. For example, if much guidance text is defined for an assessment, it might be appropriate to close the guidance results cluster to preserve space on the assessment results page.

If you choose to display guidance, you must also document the text that must be displayed for specific factor classifications, factor classification sub divisions, or both.

> **Note:** In order to display guidance, guidance text must be defined for specific factor classifications and/or factor classification sub divisions as part of administration. See for defining guidance for classifications and classification sub divisions for a factor.

Count Same Score As One

A case worker may be restricted to selecting a maximum number of priority factors, for example, a case worker may only be allowed to specify 3 priority factors. If multiple clients on an assessment achieve the same score for the same factor, then this indicator allows this factor to be counted as one rather than two (if there are two clients). For example, if client 1 and client 2 score -3 for substance abuse, and this indicator is switched on, a case worker can specify that substance abuse for both clients are priorities and the case worker can then select two more priority factors i.e. 4 priority factors can be selected instead of the maximum of three. If this indicator was switched off, substance abuse for client 1 and substance abuse for client 2 could be selected along with only one other factor i.e. The maximum of 3.

Security Identifiers

When a user attempts to perform particular operations on an assessment, the system will check to ensure the user has the appropriate privileges to perform a particular action. A number of security identifiers (SIDs) can be defined, and if specified, must be included in a users profile before they can perform the associated action. The following table outlines the SIDs that can be specified for an assessment.

Table 1: Assessment SIDs

SID	Description
Create Rights SID	If specified a user must have this SID in their security profile to create an assessment.
Approve and Reject Rights SID	If specified a user must have this SID in their profile to approve or reject an assessment.
View Answer Rights SID	If specified a user must have this SID in their profile to view an assessment.
Close Rights SID	If specified a user must have this SID in their profile to close an assessment.

Configuring assessment approval checks

Assessment approval checks determine the percentage of assessments that must be reviewed by a case supervisor. For example, an approval check can be set up such that 50% of assessments submitted for approval will require manual approval; the other 50% will be automatically approved.

Three configuration options are available that allow the agency to configure assessment approval checks. Assessment approval checks can be set up at the user, organization unit, or assessment definition level. Creating approval checks for a user governs assessments submitted by a particular user; creating approval checks for an organization unit governs assessments submitted by all users assigned to positions in that organization unit; creating approval checks at the assessment definition level governs all assessments of that type submitted (across all users).

At the user and organization unit levels, an administrator can specify whether the approval check should apply to a single assessment type or to all assessment types. When an an assessment is submitted for approval by a user, the system first checks the user's assessment approval check information. If no assessment approval checks exist at the user level, the system then looks for any assessment approval checks for the organization unit that the user belongs to. If there are no assessment approval checks for the organization, then the system checks the assessment approval. If at any point the system determines that the assessment requires approval, the assessment is assigned to a case supervisor for approval.

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.

Adding A New Category To The Category Code Table

Categories are defined in the AssessDefFactorType code table. A new category can be dynamically added to this code table and published as part of system administration. Two default categories 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**.

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 configure, 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**.

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.

Name	Description
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.
Initial Warning Days	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.
	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.
	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.
Escalation Warning Days	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.
	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.
	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 casework, the system automatically might send a notification to a case supervisor after 10 days.
Hide From Result	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.
	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.

3. Click **Save**.

Re-ordering How Classifications are Displayed

Administrators can re-order the way classifications are displayed in the assessment results. The classification display order dictates the order in which the classifications are graphed or listed in the assessment results.

Once re-ordered, the classifications are displayed from top to bottom for listed assessment results. For graphed assessment results, the classifications are displayed from top to bottom on the y-axis of the graph.

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 Role...**.
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.

Name	Description
Type Abbreviation	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. For example, the role of "Primary Caregiver" can be abbreviated to "PC".
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	Indicates whether a client must be specified for the role when the assessment is run. 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.
Multiple Clients	Indicates whether the assessment role applies to multiple clients or not. 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.
Questions Applicable	Indicates whether the assessment questions are asked for this role in the assessment script. For some cases, questions are not asked of clients that are fulfilling a particular role. 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. **Note:** If the assessment type is group-based, then this indicator is not applicable.

3. Click **Save**.

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**.

Application property for configuring available case participant roles

The curam.assessmentplanning.applicableCaseParticipantRole is used to define which case participant role types from the `CT_CaseParticipantRoleType.ctx` code table are displayed to the caseworker when an assessment is run from a case.

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 Factor...**.
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.
Category	The type of factor, for example, Need or Barrier.
	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.
	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.
	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.
Reference	The reference identification for the factor definition so the factor can be referenced by the rules.
End Date	The end date of the factor.

Name	Description
Threshold	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.
	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.
	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.
	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.
Merge	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.
	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.
	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.
Planning Applicable	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.

3. Click **Save**.

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**.

Mapping Outcomes to Factors

Outcomes can be assigned to assessment factors. If an assessment uses a CDA matrix to derive the results, CDA outcomes must be mapped directly to assessment factors. This differs slightly depending on how the CDA matrix for the assessment is configured. If the CDA question matrix is scored with outcomes specified for each answer, these outcomes will be presented to the administrator when mapping the outcome to the factor for the assessment. For example, in the Mental Health decision matrix, scores are assigned for each question/answer value. These scores are also mapped to the various Mental Health assessment outcomes. When selecting an outcome for the assessment factor depression, the outcome that has been specified in the decision matrix (Mental Health Depression) is presented to the administrator for selection.

Mapping outcomes to factors for assessments that are not based on scoring is slightly different. If assessment outcomes are not specified for the answer values in the assessment question matrix, the administrator selects the required outcome for each factor classification from the list of available outcomes for the assessment.

> **Note:** Assessments which use a CER rule set to derive the results do not use outcomes as outlined above. CER rule sets can be created to produce scoring and/or classifications, so outcomes do not need to be defined.

Reordering factors
Administrators can reorder the way factors are displayed in an assessment. For example, after the factors are reordered, factors are displayed in a particular order in the results list when an assessment is executed.

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 Classifications on page 21 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.

Name	Description
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 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**.

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.
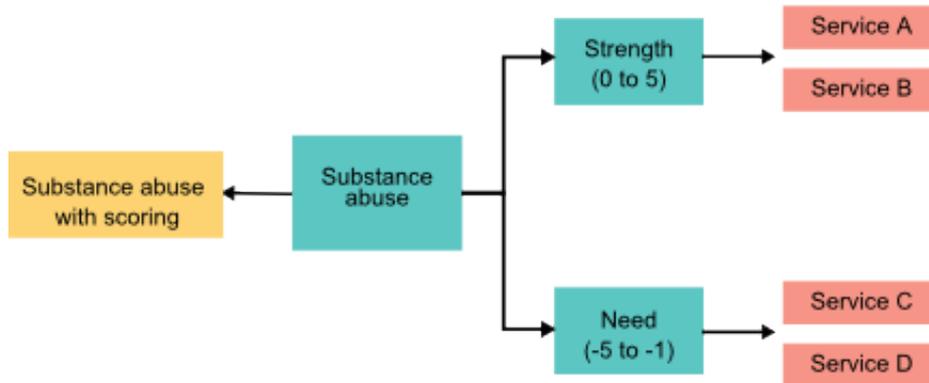

Activities can also be recommended at a more granular level, for example a day retreat program (Service D) can be recommended if a client scores a value of -5.

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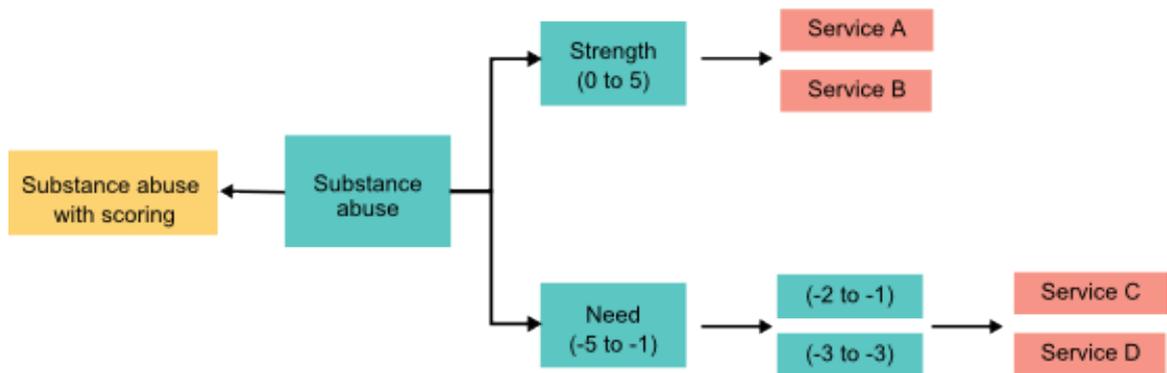
Objectives can also be configured such that they are recommended when an assessment is run. Note: This configuration is reserved for future use.

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**.

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 Availablility**.

5. From the **Edit Assessment Availability** window, select where an assessment can be run from within an outcome plan and click **Save**.

1.2 Configuring outcome plans

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

Introduction

This chapter provides an overview of the configurations available for defining outcome plans in Outcome Management administration. Outcome Management allows agencies to define different types of outcome plans. Once outcome plans have been defined, plans can be created to identify and address client needs. There are five main aspects to configuring an outcome plan:

• configuring outcome plan goals
• configuring outcome plan objectives
• configuring outcome plan factors
• configuring outcome plan types
• configuring actions
• configuring progress
• configuring recommendation conditions

Note: services can be added to outcome plans. For more information about configuring services, see the *Provider Management Guide*.

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 Goal...**.

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**.

Configuring Objectives

Objectives can be defined by an administrator and then shared across multiple types of outcome plans. Once configured, an objective can then be added to an outcome plan by a worker. Objectives can also be recommended for an outcome plan by a worker.

The name of the objective must be specified, for example, "Improve Basic Education" or "Stay Clean and Sober". A reference can be specified which allows the objective to be referenced in code.

A Rename Allowed Indicator allows a different objective name to that defined in administration to be specified when a worker is adding an objective to an outcome plan.

Keywords can be associated with objectives which allows for easier searching of objectives when adding an objective to an outcome plan. Note: This configuration is reserved for future use.

Configuring Outcome Plan Factors

You can configure outcome plan factors that do not form part of a larger assessment.

For example, General Education Diploma (GED) assessments are often outsourced to third party providers. The third party provider sends the result of the assessment back to the agency. The

result can then be recorded by the case worker. Unlike factors described earlier, a question script is not needed since the agency will not be asking the questions of the client. As a result of this neither a CER rule set or CDA Matrix is required.

Only categories and classifications must be defined for each factor which will allow the worker to record the appropriate result for the assessment of the factor.

As with factors within an assessment, an outcome plan factor can be categorized as either a need or barrier. A reference can be specified which allows the factor to be referenced in code.

A Rating Interval can be specified which represents the frequency at which this factor should be reassessed (rated) and is used to calculate a next assessment date for this factor.

For example, the rating interval of a GED assessment factor is 30 days. If a result was recorded for this factor on 01/01/2011, the next date a result should be recorded is on the 31/01/2011.

The Planning Applicable indicator specifies whether the factor is involved in the planning aspects of the outcome plan. If the indicator is set to true, the factor will be available for selection when the case worker is adding an objective or activity to the outcome plan. If the indicator is set to false, the factor will only be displayed on the factors list on the outcome plan, and will not be displayed when the case worker is adding an objective or activity to an outcome plan, or in the activity workspace for the outcome plan.

Once the factors are created, classifications and recommendations can be defined for an outcome plan factor. See Recommendations on page 32 for information on adding recommendations.

Defining Outcome Plan Factor Classifications

Classifications can be defined for an outcome plan factor. Classifications for outcome plan factors define the results that a case worker can select from when recording results for a client for a factor. Unlike classifications for assessment factors, the classifications do not need to be associated with a category.

The classification can be selected from the Name drop down on the above page. These values are stored in the Classification Division Type code table. See Classification code table on page 21 for information on this code table.

As with assessment factors, Initial Warning Number of Days and Escalation Number of Days can be specified for outcome plan factor classifications. Outcome plan factors can be prioritized within an outcome plan and as such notifications can be sent based on the configurations below if a priority factor has not been dealt with appropriately. For more information, see the Initial Warning Days and the Escalation Warning Days sections of Configuring the classification association with a category on page 22.

A definition, guidance text, and recommendations also can be defined for outcome plan factors. For more information, see Configuring a classification subdivision on page 32 and Recommendations on page 32.

> **Note:** Classification subdivisions are not provided for outcome plan factor classifications as more granular values can be added to the Classification Division Type code table if necessary.

Configuring Outcome Plan Types

Outcome Management provides the ability for organizations to configure multiple types of outcome plans which can be used to address a client's needs. For example, a Self Sufficiency plan can be defined to help a client return to work. A Reunification Plan can be defined to reunite a family who have been separated because of substance abuse issues in the home.

Each outcome plan type can define it's own set of goals, objectives and factors such that only the appropriate goals, objectives and factors can be selected for a type of outcome plan. For example, a goal of Return to Work could be associated with a Self Sufficiency outcome plan where as a Return Home goal would be associated with a Reunification Plan.

This section outlines the configuration options available for an outcome plan and how to associate goals, objectives, factors, recommendations and cases with an outcome plan.

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 Outcome Plan...**.

2. From the **New Outcome Plan** window, enter the following details to create a new outcome plan.

Table 2: 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.

Name	Description
Goals Applicable To	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 • Outcome Plan Only • Clients Only • Outcome Plan • Clients Specifying Outcome Plan Only means that a goal can be created at the outcome plan level only. 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. 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.
Agreement Approval Check	Agreement approval checks determine the percentage of outcome plan agreements that must be reviewed by a case supervisor.
Ownership Strategy	On the creation of an outcome plan, the ownership of the outcome plan is automatically assigned to the user which, created the outcome plan. 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.
Description	The localizable description of the outcome plan administration.

Table 3: Multidisciplinary Team

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

Name	Description
Type	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.
	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.
	If 'Ad hoc' is specified, a caseworker can add individual multidisciplinary team members to the outcome plan.
Sharing Enabled	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.
	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.
	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.
	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.
Portal Home Page	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.
	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.

Table 4: 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	If the Create Action indicator is turned on, a caseworker is allowed to add user-defined actions to an outcome plan.
	If the Create Action indicator is turned off, an action must be selected from a pre-defined list of actions.
Create Objectives	If the Create Objective indicator is turned on, a caseworker is allowed to add user-defined objectives to an outcome plan.
	If the Create Objective indicator is turned off, an objective must be selected from a pre-defined list of objectives.
Create Factors	If the Create Factor indicator is turned on, a caseworker is allowed to add user-defined factors to an outcome plan.
	If the Create Factor indicator is turned off, a factor must be selected from a pre-defined list of factors.

Table 5: Review Options

Name	Description
First Review (days)	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.
	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.
Frequency Calculation	The Frequency Calculation can be based on the 'Scheduled Date' or the 'Previous Review Completion Date'.
	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'.

Name	Description
Frequency (days)	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.

Table 6: Visits

Name	Description
Visits Applicable	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.
	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.
	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.
	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.
	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.

Name	Description
Acceptable Duration (%)	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.
	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.
Lower Age Limit Upper Age Limit	The administrator can also specify the age range for the clients to be visited for an outcome plan.
	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**.

Agreement Approval Checks

Agreement approval checks determine the percentage of outcome plan agreements that must be reviewed by a case supervisor. For example, an approval check can be set up such that 50% of agreements submitted for approval will require manual approval; the other 50% will be automatically approved.

Agreement approval checks can be set up for an outcome plan, an organization unit, and a user. Creating approval checks for a user governs agreements submitted by a particular user; creating approval checks for an organization unit governs agreements submitted by all users assigned to positions in that organization unit; creating approval checks at the outcome plan level governs all agreements submitted on outcome plans of that type (across all users). At the organization unit and user levels, an administrator must specify whether the approval check should apply to a single outcome plan or to all outcome plans.

When an agreement is submitted for approval by a user, the system first checks the user's agreement approval check information. If no agreement approval checks exist at the user level, the system then looks for any agreement approval checks for the organization unit that the user belongs to. If there are no agreement approval checks for the organization then the system checks the agreement approval checks at the outcome plan level.

Multidisciplinary Team Configuration

An outcome plan can be configured such that a multidisciplinary team can be assigned to the plan. This section outlines the configuration options available.

Multidisciplinary Team Type

Multidisciplinary team configurations allow an administrator to define the type of multidisciplinary team that can be added to an outcome plan. A 'Predefined Team' or an 'Ad hoc' team can be selected from the multidisciplinary team type drop down list. If the 'Predefined Team' is specified, a case worker must select from a list of teams that have been pre-configured in multidisciplinary team administration when adding a multidisciplinary team to an outcome plan. If 'Ad hoc' is specified, a case worker can add individual multidisciplinary team members to the outcome plan.

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

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**.

Associating Objectives

One or more objectives can be associated with a type of outcome plan. The associated objectives are then selectable when a case worker adds an objective to an outcome plan.

Associating Factors

One or more factors can be associated with a type of outcome plan. The associated factors are then selectable when a case worker adds a factor to an outcome plan.

Configuring Recommendations

Recommended objectives and activities can be defined for an outcome plan. Recommending objectives and activities for an outcome plan means that the recommended objectives and activities are displayed to a case worker in the planning workspace when an outcome plan has been created. Recommended activities can also be defined for a recommended objective. Objectives can also be configured such that they are recommended when an assessment is run. Note: This configuration is reserved for future use.

Recommended objectives and activities can also be configured so that they are only displayed within an outcome plan if specific conditions are met. A condition can be based on gender, age, a rule set, a factor score or a factor classification. Conditions can be grouped together into sets, for example, a condition set can contain a condition for gender and for age. Conditions or condition sets are then associated to recommended objectives and activities.

If changes are made to the configuration of recommendations that may have contributed to the creation of recommended objectives or activities within an outcome plan, the date and time of the update is captured and used by related outcome plans to determine when outcome plan recommendations may have been invalidated by administrative changes.

Adding recommendations to an outcome plan is the same process as adding recommendations to a factor classification.

See Recommendations on page 32 for information on adding recommendations.

Configuring Compliancy Levels And Reschedule Reasons For Visits

If visits are applicable for an outcome plan, the administrator can specify compliancy levels and associate percentage ranges for each compliancy level. The configured ranges are used to determine which level to display when a case worker is evaluating visits during a plan review.

For example, the following levels and ranges may be specified:

- Rarely falls between 0-25
- Sporadically falls between 26-50
- Routinely falls between 51-75
- Totally falls between 76-100

If a case worker is carrying out a review for a period of one week, and the visitation plan specifies that two visits are to occur each week. If two compliant visits occurred in the week, the compliancy level would be Totally. If one compliant visit occurred in the week, the compliancy level would be Sporadically (i.e. 50% compliant). If no compliant visits occurred, the compliancy level would be Rarely (i.e. 0% compliant).

The administrator can also indicate the reschedule reasons that are considered acceptable from a compliancy point of view. This configuration is used to determine if a rescheduled visit is compliant. If the visit was rescheduled for an acceptable reason, for example, Chronic Illness, the visit may be considered compliant subject to other compliancy criteria being met such as the duration of the visit and the method of contact. If the visit was rescheduled for an unacceptable reason, for example, Overslept, it will be considered non compliant.

Configuring The Printable Document Content

The case worker has the ability to view a printable document, which contains information on items such as goals, objectives, assessments, activities, etc. associated with the outcome plan. The case worker can select which content items to include each time he or she selects to View Printable Document. The administrator can configure the content items that are available for a case worker to include in printable documents for an outcome plan type. For example, if objectives are not relevant to the outcome plan type, the administrator can select to exclude objectives so that they are never available for the case worker to select for inclusion in the document.

Customers are free to replace the out of the box printable document with a custom version. Customizing the printable document is a development activity. A hook is provided that allows customers to implement their own document. See the JavaDoc for more information.

Associating Cases

Integrated cases can be associated with outcome plans. Associating integrated cases with outcome plans allows an administrator to dictate the types of integrated cases from which an outcome plan can be created.

Configuring activities

You can define activities and share them across multiple types of plans. After an activity is configured, you can add an activity to a plan.

Related concepts

When you search for objectives or activities, you can use keywords as search terms to help you to relevant items quickly. You can tag activities and objectives with the relevant keywords for your requirements.

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.

Keywords

When you search for objectives or activities, you can use keywords as search terms to help you to relevant items quickly. You can tag activities and objectives with the relevant keywords for your requirements.

For example, you might associate the keywords 'depression' and 'anxiety' with an activity called 'Attend Individual Counseling'. If a care coordinator searches on the keyword 'depression', 'Attend Individual Counseling' is returned with the other activities that are associated with depression.

You can associate one keyword with multiple activities or objectives. A keyword must have no spaces, for example Depression or MentalHealth. You can set a maximum limit on the number of keywords that can be associated with an item by using the 'Maximum number of keywords per object' property. You can associate keywords with activities from the Service Offering tab and from the Services list, the Objectives list, or the Actions list.

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 Action...**.
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	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**.

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.

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.

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. |
Fixed Cost	Indicates the fixed cost of this type of action.
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.

Name	Description
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 *Outcome Management Configuration Guide*.
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**.

Responsibility

Use the Responsibility list to define how responsibility is assigned to an action.

- **User Creating Action**
  The responsibility of the action is automatically assigned to the user who is adding the action to the plan.
- **Any Client**
  The responsibility can be specified by the user that creates the action. The user can search for a client when they add the action to the plan.
- **Client Selected**
  The responsibility can be specified by the user that creates the action. The user can select from a list of clients when they add the action to the plan.
- **Any User**
  The responsibility can be specified by the user that creates the action. The user can search for a user when they add the action to the plan.
- **MDT member**
  The responsibility can be specified by the user that creates the action. The user can select from a list of MDT members when they add the action to the plan.

- **Either User or Client**

  The responsibility can be specified by the user that creates the action. The user can search for a user or a client when they add the action to the plan.

Security Identifiers

When a user attempts to perform particular operations on an action, the system checks that the user has the appropriate privileges to perform a particular operation.

A number of security identifiers (SIDs) can be defined, and if specified, must be included in a users profile before they can perform the associated action. The following table outlines the SIDs that can be specified for an action.

Table 7: Action SIDs

SID	Description
Create SID	If specified a user must have this SID in their security profile to create the action.
Modify SID	If specified a user must have this SID in their profile to modify the action.

Batch Process

The batch process, StartEffectiveOutcomePlanActions, automatically updates the status of actions which have not been started. It processes actions with a start date in the past, a blank or future end date, and a status of 'Not Started', and updates the status of these actions to 'In Progress'.

The batch process can be executed from the Batch Process section of the System Administration application. When executing the batch process, the user can enter the date to use when checking the start date of the actions. If this is not set, the current date is used.

For more information on executing batch processes, see the *Operations Guide*.

Configuring services and referrals

Complete the following tasks to configure services and referrals.

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 Progress...**.

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**.

Configuring Recommendation Conditions

Recommendation conditions can be used to filter the recommended activities on an outcome plan, such that only those recommendations where the client satisfies the related condition are displayed. A condition can be based on gender, age, an assessment question and answer, or rule set. A condition is first defined and then associated with an activity so the same conditions, once defined, can be associated with multiple activities. For example, James Smith (age 38) is classified as having a Need in Substance Abuse. Adolescent Substance Abuse Treatment and Adult Inpatient Substance Abuse Treatment activities have been configured as recommendations for clients classified as having a Need in Substance Abuse. A condition has been associated with Adolescent Substance Abuse Treatment such that it is only recommended if the client is between the ages of 16 and 17. A condition has been associated with Adult Inpatient Substance Abuse Treatment such that it is only recommended to clients over the age of 18. As a result of the age conditions associated with Adolescent Substance Abuse Treatment and Adult Inpatient Substance Abuse Treatment, only Adult Inpatient Substance Abuse Treatment is recommended for James as he is over the age of 18.

Conditions can be grouped together into condition sets to allow for more complex condition processing, for example, a condition set can contain a condition for gender and a condition for age. For example, James Smith is classified as having a Need in Substance Abuse. Adolescent Substance Abuse Treatment and Adult Inpatient Substance Abuse Treatment have been configured as recommendations for clients classified as having a Need in Substance Abuse. A condition has been associated with Adolescent Substance Abuse Treatment such that it is only recommended if the client is between the ages of 16 and 17. A condition set has been associated with Adult Inpatient Substance Abuse Treatment such that it is only recommended to male

clients over the age of 18. Based on this condition, Adult Inpatient Substance Abuse Treatment is recommended for James as he is over the age of 18 and is a male.

Configuring outcome plan system properties

You can configure other aspects of an outcome plan with system properties.

Procedure

1. Log in to the Cúram application as a user with system administrator permissions.
2. Select the **System Configurations** tab, expand the **Shortcuts** menu, and click **Application Data** > **Property Administration**.

   You can edit system properties to configure the following options:

   - **Configuring colors in factor graph**

     The curam.outcomeplanning.factorGraphRGBColor application property indicates the color of the graph that is displayed for a factor within an outcome plan. The default value is F0A41D.

   - **Configuring referrals to appear in agreements**

     The application property curam.outcomeplanning.referralForAgreementDays defines the number of days before the current date that a referral should be displayed in the agreement creation wizard. For example, if the configuration specifies 60 days then only referrals that have been created in the last 60 days are available for selection within the agreement.

   - **Configuring the agreement issue method**

     The application property curam.outcomeplanning.issueAgreementMethod dictates how an outcome plan agreement can be issued. The possible values are 'email', 'post' or 'email or post'. The default value is 'email or post'.

   - **Configuring the agreement document name**

     The application property curam.outcomeplanning.agreeementDocumentName dictates the name of the document that is issued to the clients and signatories of an agreement. The default value is 'Agreement'.

   - **Configuring whether to issue agreement**

     The application property curam.outcomeplanning.issueAgreeementDocument dictates whether the agreement is issued automatically to clients and signatories of an agreement.

   - **Configuring my next review number of days**

     The application property curam.outcomeplanning.myNextReviewsNumberOfDays is used to define the default value that is used for the number of days filter on the My Next Reviews summary view.

   - **Configuring application and portal links in emails**

     The application property curam.ise.impl.MDTPortalHomePage is used to define the multidisciplinary team portal link(used to log in to the portal) to be included in emails that are sent to external multidisciplinary team members when a note, attachment or activity is added to an outcome plan.

The application property curam.ise.impl.ApplicationHomePage is used to define the application link(used to log in to the application) to be included in emails that are sent to agency workers when an activity has a note or progress added to it by an external multidisciplinary team member through the multidisciplinary team portal.

- **Configuring whether to display compliant visitation logs only as part of a visit review**

The application property curam.outcomeplanning.displayCompliantLogsOnly dictates whether only compliant visitation logs are displayed to a caseworker during a plan review, or whether all visitation logs, including non-compliant logs, are displayed.

Configuring the automatic population of plans

When you are creating plans, you can choose to automatically populate new outcome plans with a set of default objectives and activities. By default, this function is disabled. When enabled, objectives and activities, but not factors, are added with default settings for any mandatory fields to a newly created plan.

About this task

Only outcome plans with one member can be automatically populated with objectives and activities, automatic population is not supported for outcome plans with multiple members. If an outcome plan has more than one member, the application does not populate that outcome plan with default data, but creates an empty outcome plan as usual.

Enabling this configuration adds all the recommended objectives or activities that are configured for an outcome plan.

If the same activity is recommended for more than one plan objective, the activity is added to the plan and associated with all objectives for which it is recommended. If an activity is recommended for both a plan and a plan objective, the activity is added to the plan and also associated with the plan objective.

Outcome plans that exist before you enable this setting are not affected and remain unchanged.

Procedure

1. Log in to the Cúram application as a user with system administrator permissions.
2. Click the **System Configurations** tab, expand the **Shortcuts** menu, and click **Application Data** > **Property Administration**.
3. In the **Application - Outcome Planning Settings** category, set the **Enable Automatic Population of Outcome Plans** property.

Option	Description
true	Outcome plans are automatically populated.
false	Outcome plans are not automatically populated. The default value is false.

4. Click **Publish**.

Configuring the planning workspace

Complete the following tasks to configure the workspace for your custom requirements.

Procedure

1. Log in to the Cúram application as a user with system administrator permissions.
2. Select the **System Configurations** tab, expand the **Shortcuts** menu, and click **Application Data** > **Property Administration**.
3. In the **Application - Outcome Planning Workspace Settings** category, confirm that the following settings are suitable for your system:

Option	Description
Default Side Panel View	The view that is to be displayed when the side panel of the workspace loads. The default value is OPWOT31001.
Default Workspace View	The view that is to be displayed when the workspace loads. The default value is OPWS31001.
Favorites View Enabled	Enables the favorites view in the side panel on the workspace. The default value is true.
Hide completed workspace activities	Hides completed activities on the workspace. The default value is true.
Hide completed workspace objectives	Hides completed objectives on the workspace. The default value is true.
Maximum length of Objective/Activity description displayed in the workspace	The maximum length of Objective/Activity description that is displayed on the side panel in the workspace. The default value is 50.
Maximum number of concurrent embedded pages open	Do not change. The maximum number of embedded UIM pages that can be open at any time. This limits the number of activity drop-down panels that can be opened at the same time. The default value is 5 and must not be exceeded..
Maximum number of items in content area	Do not change. The maximum number of items that can be displayed in the content area of the workspace. This limits the number of objectives and activities that can be displayed. The default value is 200 and must not be exceeded.
Maximum number of items in side panel	Do not change. The maximum number of items that can be displayed in any of the views on the side panel. This limits the number of items that can be displayed in the Recommendations, Favorites, or Search

Option	Description
	results. The default value is 150 and must not be exceeded.
Maximum number of points on progress chart	The maximum number of points that can be displayed on the progress graph in an outcome plan workspace. For example, if this property is set to 5, the 5 latest progress updates are displayed in the graph. If there are less than 5 updates, then all progress updates are displayed in the graph. The default value is 10.
Maximum number of points on tooltip progress chart	The maximum number of points that can be displayed in the graph on the progress tooltip in an outcome plan workspace. For example, if this property is set to 5, the 5 latest progress updates are displayed in the graph. If there are less than 5 updates, then all progress updates are displayed in the graph. The default value is 10.
Minimum numbers of characters to enable search	The minimum number of characters that must be entered before you can search. The default value is 3.
Plan item photograph column count	The number of columns of photographs to be displayed on an objective or activity on the main content area of the workspace. The default value is 3.
Recommendations View Enabled	Enables the recommendations view in the side panel on the workspace. The default value is true.
Search View Enabled	Enables the search view in the side panel on the workspace. The default value is true.
Timeline View Enabled	Enables the timeline view in the main content area of the workspace. The default value is true.
Workspace List View Enabled	Enables the planning workspace list (objective/activity based workspace list). The default value is true.

4. If you change any values, click **Publish** to save your changes.

Configuring the planning workspace search

You can configure how much weight is given to full and partial matches for search criteria when you are searching objectives and activities in the planning workspace.

About this task

The maximum value for each setting is 100. The higher the value, the more weight is given to the match in searches.

Procedure

1. Log in to the Cúram application as a user with system administrator permissions.

2. Select the **System Configurations** tab, expand the **Shortcuts** menu, and click **Application Data** > **Property Administration**.

3. In the **Application - Outcome Planning Settings** category, confirm that the following settings are suitable for your system:

Option	Description
Weighting for Description	The weighting given to a word found in the description of an Objective or Activity. Used to order a list returned from a search. The default value is 3.
Weighting for keyword	The weighting given to a search term that matches a keyword associated with an Objective or Activity. Used to order a list returned from a search. The default value is 10.
Weighting for Name	The weighting given to a word found in the name of an Objective or Activity. Used to order a list returned from a search. The default value is 100.
Weighting for Partial Description	The weighting given to a word found in the description of an Objective or Activity where a partial match was found. For example, if the search term was 'help' and the word in the description was 'helping' this would be a partial match. Used to order a list returned from a search. The default value is 1.
Weighting for Partial Name	The weighting given to a word found in the name of an Objective or Activity where a partial match was found. For example, if the search term was 'help' and the word in the name was 'helping' this would be a partial match. Used to order a list returned from a search. The default value is 20.

4. If you change any values, click **Publish** to save your changes.

Outcome Plan Security

Outcome Management leverages the case security check functionality to allow for case security checking to be performed on an outcome plan. There is no security check in place out of the box, however a hook is provided that allows customers to implement their own security processing for an outcome plan case. Implementing custom security processing for an outcome plan is a development activity. See the JavaDoc for more information.

1.3 Using dynamic products with outcome management

Outcome Management uses service deliveries to deliver CPM registry based services to clients.

Service deliveries are appropriate where there are no additional eligibility requirements (other than the fact that the client is already eligible and in receipt of a primary benefit, for example, TANF and payment for the service is based on receipt of either an invoice or attendance roster from a provider. However, not all services can be delivered in this manner. Some services may have their own eligibility criteria in addition to that of the primary benefit. Other services may pay the client directly rather than pay the provider. To accommodate these types of services, outcome management supports the delivery of services using product deliveries which optionally integrate with CPM service authorization and invoice processing.

These types of product delivery are a combination of the features of a standard product delivery and a standard service delivery. This allows case workers to utilize product delivery features, such as evidence management, eligibility determination and financial processing along with functionality that is specific to service deliveries such as, provider selection, provider enquiries, reviews, progress reporting and if required for the service, payment based on receipt of an invoice or attendance roster from a provider. Any CPM based service can be configured to use a product delivery rather than a service delivery to provide the service to clients.

Cúram version 6 introduces the concept of dynamic products. These are products that can be implemented purely by configuration using the Cúram Administration Application. Typical development activities such as Java coding, UIM development and compilation are not required. A more detailed description of dynamic products is beyond the scope this document.

Dynamic products are delivered using product delivery cases. Therefore, they can be used to deliver the types of service that cannot be delivered using service deliveries. For instance, a service such as Mileage Reimbursement may be delivered using a dynamically configured product delivery. This type of service is not suitable for delivery using the standard service delivery functionality as it is a payment made to a client based on the amount of mileage the client has traveled to attend work related activities; service deliveries pay a provider based on an invoice or an attendance roster. In addition, there is evidence that must be captured (the distance traveled etc.) and rules that are executed to determine the amount to be payed (the rate may vary depending on the mileage claimed) to the client. The dynamic evidence editor is used to add the mileage reimbursement evidence set and the CER Rules Editor is used to add the rules to determine the amount to be paid. The remainder of this section outlines the steps that need to be undertaken to configure a dynamic product, such as Mileage Reimbursement, to be delivered as a service from an outcome plan.

Configuration example

Step 1: Log in to the *Cúram Administration Application*.

Step 2: Open the *Rules and Evidence* shortcuts panel section in the *Administration Workspace*.

Step 3: Click the *Dynamic Evidence* link. Add the required dynamic evidence tables and user interface using the *Dynamic Evidence Editor* (A detailed description of the use of the editor is beyond the scope of this document. Please consult the appropriate documentation for more detail). Ensure that you activate the evidence when you have completed the evidence definition and user interface specification.

Step 4: Click the *Cúram Express Rule Sets* link in the shortcuts panel. Add a new rule set and use the *CER Rules Editor* to add the appropriate rules (A detailed description of the use of the editor is beyond the scope of this document. Please consult the appropriate documentation for more detail). Make sure that you publish the rule sets when you are finished implementing the rules in the rules editor.

Step 5: Open the *Case* shortcuts panel section and click on the *Product Delivery Cases* link. Use the *New Product...* link to add a new product using the *New Product* wizard. Associate the evidence and rules added in the previous steps with the new product by opening the product in a new tab and navigating to the *Evidence* and *Rules* navigation bar tabs respectively. You now have defined a product delivery that can be used to deliver benefits to clients. However, at this stage the product delivery cannot be used with an outcome plan. The following steps detail how the product delivery can be delivered as a service from an outcome plan.

Step 6: Open the *Provider Management* section in the shortcuts panel and click on the *Service Offerings* link.

Step 7: Click the *New Service Offering* link. Enter service offering configuration information to meet the needs of your service in the **New Service Offering** dialog that is opened. In order to use the product defined in the step 5, you must set the value of the *Delivery Type* field. This should be set to *Product Delivery, Product Delivery with Invoicing or Service Delivery with Eligibility*, all of which use product delivery processing. Use the *Product* field to open a product selection dialog where you can select the product created in step 5. Your product is now configured to be delivered as a service from an outcome plan.

1.4 Configuring CDA assessments

Specific steps must be completed in the Cúram Administration Application to configure an assessment that uses Cúram Decision Assist (CDA) to produce results that lead to activity recommendations for use in an outcome plan.

CDA is used when the rules associated with the assessment are not complex. CER is used for more complex assessments where the assessment logic may not be encompassed in the CDA decision matrix. In this example, you will be shown the steps that need to be followed in order to use a CDA based assessment with an outcome plan. These steps are the same regardless of the size and complexity of the IEG script used to capture the answers to the questions and the decision matrix used to determine the assessment results. Therefore, this example will employ a very straightforward IEG script consisting of a single page and question only, and an

equally straightforward CDA decision matrix producing a single outcome based on the answer to the question posed in the IEG script. Neither the IEG script or the decision matrix are to be considered as something that could ever be employed in a real world situation. This example does not set out to describe how to use either IEG or CDA. Some information, relevant to the example, will be provided in the use of these tools.

This example is based on an assessment used with a back to work type of outcome plan. The assessment is used to determine a client's basic literacy and child care needs.

The answer to the literacy question, "Are you able to read and write and do basic math?" either yes or no, is used to determine the type of activities that should be recommended to the client for literacy on their back to work outcome plan.

The answer to the child care question, "What best describes your child care situation?" is any of the following values, 'Child care not needed', 'Child care unaffordable', 'Child care unavailable, 'Child care is subsidized', which determines the type of activities that should be recommended to the client for child care on their back to work outcome plan.

Configuration example

Step 1: Log in to the Cúram Administration Application.

Step 2: Open the Decision Assist section in the Shortcuts Panel in the Administration Workspace.

Step 3: Click the New Questionnaire link and complete the information in the dialog opened by entering a name and selecting a type. Note: specifying an apostrophe in the name of the questionnaire is not supported.

Step 4: A tab should be opened for the newly created questionnaire. Use the tab actions menu to release the questionnaire. This must be done in order for the questionnaire to be available in step 22.

Step 5: Use the New Outcome link in the Decision Assist Shortcuts Panel section to add the outcome that will produced from the decision matrix. Enter the outcome name and specify the outcome type in the dialog displayed. For this example, add an Education outcome and a Child Care outcome for this back to work assessment.

Step 6: Log out of the Administration application and login to the System Administration application.

Step 7: Open the Application Data section in the Shortcuts Panel in the System Configurations.

Step 8: Click the Code Tables link and select the New Code Table... button and enter the code table name. In this example, enter the name Child Care Reason for the new code table.

Step 9: Open the new code table just created and add the code table items by selecting New Item from the action menu.

Step 10: On the New Code Table Item modal specify the Code, Description and Sort Order and select the Selectable checkbox.

Step 11: For this example, enter four codetable items for the Child Care Reason code table, 'Child care not needed', 'Child care unaffordable', 'Child care unavailable', 'Child care is subsidized'.

Step 12: Open the code table list and select to Publish the code table changes.

Step 13: Log out of Cúram System Administration Application.

Step 14: Log in to the Cúram Administration Application.

Step 15: Open Intelligent Evidence Gathering section in the Shortcuts Panel in the Administration Workspace.

Step 16: Click the Datastore Schemas link and select the New Schema... button and enter the datastore name. This datastore is required to define any new domains (i.e. they don't exist in IEGDomains schema) required for your assessment, for example if new code tables are required for the answers to the assessment questions. Recommend naming this datastore after the assessment and append the text 'Domains', for example, BackToWorkDomains.

Note: A datastore will automatically be created when a CDA question script is created and both the script and datastore are under version control. This generated datastore should just be used to define your entities and attributes; it should not be used to define new domains. Defining your new domains in this datastore created by CDA will result in the domains being repeated when you start creating new versions of the CDA question script and this will result in errors when you attempt to run your script.

Step 17: Open the datastore editor for the newly created datastore schema by selecting the Edit option from the list action menu for the datastore.

Step 18: Add the IEG domains schema by clicking on the Includes link, select the Include Schema button and select IEGDomains from the dropdown presented.

Step 19: Add a new domain by clicking on the Domains link, select the Add Domain button and enter the name of the new domain, select the parent from the parent drop down and expand the Options cluster and enter the codetable name. For the example, enter CHILDCARE_REASON as the domain name, select IEG_CODETABLE_CODE as the parent and enter ChildCareReason as the codetable (as specified in sys admin).

Step 20: Select to save the schema.

Step 21: Use the Shortcuts Panel to navigate to the Outcome Management section. Click the CDA Assessment Configurations link to open a page displaying a list of the outcome management CDA based assessments configurations.

Step 22: Click the New CDA Assessment Configuration... link and enter the name for the CDA assessment configuration. Select the CDA questionnaire created in step 3 and released in step 4 (if the questionnaire does not appear in the drop down it is most likely that you have forgotten to release the questionnaire).

Step 23: Click the Questionnaire link in the newly created row on the CDA assessment configurations list. A new tab representing the questionnaire should be opened.

Step 24: Use the page actions menu to create a new version of the questionnaire.

Step 25: Use the Edit Question Script menu item from the page actions menu to open the IEG Editor in a new tab.

Step 26: Set the following IEG fields to the values in the table below:

Table 8: IEG Field Settings

IEG Field	Value
Quit Page	AssessmentScript_exit
Finish Page	AssessmentDelivery_executeAssessment
Config Properties	assessment-ieg-config

If you are dealing with a single page assessment (as is the case here), uncheck the Show Progress Bar and Show Sections checkboxes.

Step 27: Click the Datastore Editor tab in the IEG Editor and select the Includes tab to view the schemas. A schema will already be created by CDA and this will have the same name as the questionnaire with a version number appended.

Step 28: Add the new domain datastore, BackToWorkDomains, that was just created for the assessment domains by clicking on the Includes link, select the Include Schema button and select the BackToWorkDomains datastore from the dropdown presented. On the includes tab, four schemas should now be displayed, IEGDomains, BaseDomains, the new schema which defines your domains, BackToWorkDomains and the schema created by CDA. The IEGDomains is automatically added as it was already included in the BackToWorkDomains datastore. The IEGDomains should not be modified, the new domain schema, BackToWorkDomains can be modified from here but only to update or add new domains and the schema created by CDA should be used to add the new attributes and entities required for the IEG script.

> **Note:** If a new domain datastore is not required for the assessment, then the IEGDomains schema should be added at this point so that the IEG domains are available for use in the assessment.

Step 29: Add the assessment entities to the datastore created by CDA by selecting the Add Entities button. You will need to add a minimum of two entities; Application and Person. These entities must be added for all IEG scripts used by outcome management assessments and should be added to the datastore created by CDA.

Step 30: Make the Person entity a child of the Application entity by selecting the Application entity, right clicking and select Add Child entity. Select the Person entity from the dropdown.

Step 31: Add the following attributes to the Person entity by selecting the Person entity, right clicking and selecting Add Attribute:

Table 9: Person Attributes

Name	Type
personID	SVR_KEY
firstName	IEG_STRING
gender	IEG_GENDER
dateOfBirth	IEG_DATE
roleID	IEG_INT64
participantID	IEG_INT64

Name	Type
questionsApplicableInd	IEG_BOOLEAN

These attributes must be added for all IEG scripts used with outcome management assessments.

Step 32: Add the assessment specific entities and attributes, i.e. the attributes required to capture the data entered for your assessment. In this example, we want to capture whether or not the client has basic literacy skills. As this is related to the client, we can add a basicLiteracy attribute of type IEG_BOOLEAN to the Person entity. We also want to capture the client's child care situation. This is also related to the client, so we can add a childCareSituation attribute of type CHILDCARE_REASON to the Person entity. (Note: the IEG_BOOLEAN domain is a domain defined in the IEGDomains and CHILDCARE_REASON is a new domain that we defined in the newly created domain schema i.e. BackToWorkDomains).

Don't forget to save the schema document using the menu item provided by the IEG editor.

Step 33: Set up the IEG script by adding a new section. As this is a one question one page script, there is no need to add a page as one is automatically created for the section. Set the title of this page to 'New Assessment' (when running the assessment in outcome management this will mean that the series of screens used for this purpose have a common title). Set the Person entity as the entity to be used with this page. Add a cluster to the page and set the Person entity as the entity to be used with this cluster. Add a question (Are you able to read and write and do basic math?) to the cluster and set the question attribute to basicLiteracy as below.

Add another cluster to the page and set the Person entity as the entity to be used with the cluster. Add a question (What best describes your child care situation?) to the cluster and set the question attribute to childCareSituation.

Save the script and close the IEG editor.

Step 34: Return to the questionnaire tab opened in step 25. Use the Release menu item from the tab actions menu to release the questionnaire.

Step 35: Return to the list of CDA Assessment Configurations. Select the Add Decision Matrix menu item from the list dropdown menu for the assessment configuration you added in step 24. This opens the Add Decision Matrix dialog. Enter a name, select a type and check the Scoring by Outcome field. If your assessment has multiple outcomes then check the Multiple Outcomes field as well.

Step 36: Click the Decision Matrix field link in the list for the CDA assessments configuration, to open a tab representing the decision matrix. Select the Edit Matrix menu item from the tab menu to open the decision matrix editor.

Step 37: Click the Question button in the decision matrix editor. Ensure that the questionnaire entered earlier is selected in the questionnaire dropdown. The questions entered earlier should be displayed in the questions multi-select list. Select both questions to include in the decision matrix.

Step 38: The questions are now displayed in the decision matrix editor. The answer for the question 'Are you able to read and write and do basic math?' is a boolean and the matrix now shows True and False as answers. The possible answers to the question 'What best describes your child care situation?' is based on a code table and the matrix now shows all possible answers.

Step 39: Click the Options button and Add Score link to add a Scores column to the matrix. Add scores for all answers.

Step 40: Click the Outcome button and add the outcomes that you defined earlier in step 5 i.e. Child Care and Education. As we are using scoring to determine the result, check the Education Outcome checkboxes for both the True and False answers for the 'Are you able to read and write and do basic math?' question. Check the Child Care Outcome checkboxes for all possible answers to the 'What best describes your child care situation?' question.

Step 41: Validate and Save the changes you have made to the decision matrix. The decision matrix tab should now be open. Use the Release menu item in the tab actions menu to release the decision matrix.

Step 42: Return to the Outcome Management section in the Shortcuts Panel. Click the Assessment Definitions link to open the list of assessment definitions.

Step 43: Click the New Assessment Definition... action to open the dialog below. Enter the name of your assessment and select the assessment configuration created earlier. Select the appropriate categories, in this case Barrier.

Step 44: Click the name of the assessment you have just entered in the assessment definition list to open a tab for the assessment. Click the Roles navigation tab and select the New action to add the assessment role. Enter the name of the role, check the Mandatory and Questions Applicable checkboxes.

Step 45: Select the Categories navigation tab. Use the Add Classification menu item from the page actions menu to add two classifications, Strength and Need, for the Barrier category.

Step 46: Open the Factors tab and use the New page menu item to add a new factor. Click the name link of the factor entered to open a tab representing the factor.

Step 47: Select the Map CDA Outcome tab menu item to open a dialog allowing you to select the CDA outcome defined earlier.

Step 48: Click the Classifications navigation tab and use the Edit menu item in the list dropdown menu to set the appropriate range for both of the classifications. In this simple example, the range for the strength classification that equates to an answer of yes to the question regarding basic literacy, is set to from 1 to 1 (a value of 1 is returned from the decision matrix in response to an answer of yes to the question). Similarly, the range for the need classification is set to from 0 to 0 as a value of 0 is returned in response to an answer of no to the question.

Step 49: Return to the Outcome Management section in the Shortcuts Panel. Click the Outcome Plans link and select the New action from the page opened. Enter the name of the outcome plan, in this case Back To Work, and save the changes.

Step 50: Return to the assessment definition tab opened earlier in step 45. Click the Cases navigation tab and select the Add page link. Select the outcome plan added in the previous step from the list presented. You assessment is now available to be used from within outcome plans of this type.

1.5 Configuring a CER assessment

Specific steps must be undertaken in the Cúram Administration Application to configure an assessment that uses Cúram Express Rules (CER) to produce results that lead to activity recommendations for use in an outcome plan.

CER is typically used for more complex assessments where the assessment logic may not be encompassed in the CDA decision matrix. In this example, the reader is going to be shown the steps that need to be followed in order to use a CER based assessment with an outcome plan. These steps are the same regardless of the size and complexity of the IEG script used to capture the answers to the questions and the complexity of the CER rules used to execute the assessment logic. Therefore, this example will employ a very straightforward IEG script consisting of a single page and question only, and an equally straightforward CER rule set producing a single outcome based on the answer to the question posed in the IEG script. Neither the IEG script or the CER rule set are to be considered as something that could ever be employed in a real world situation. This example does not set out to describe how to use either IEG or the CER Rules Editor. Some information, relevant to the example, will be provided in the use of these tools, however for more detailed information please consult the appropriate documentation.

This example is based on an assessment used with a back to work type of outcome plan. The assessment is used to determine a client's basic literacy based on the answer to a single question, "Are you able to read and write and do basic math?". The answer provided to this question, either yes or no, is used to determine the type of activities that should be recommended to the client on their back to work outcome plan.

Configuration example

Step 1: Log in to the Cúram Administration Application.

Step 2: Open the *Rules And Evidence* section in the *Shortcuts Panel* in the *Administration Workspace*.

Step 3: Click the *Cúram Express Rule Sets* link to open the rule sets list page.

Step 4: Use the *New* option in the tab Actions menu to create the new rule set. Give it a name and choose a category for the rule set if appropriate.

Step 5: Find your new rule set in the list, and from the list row menu choose the *Continue Editing* menu item. In the new tab link that opens, the CER Rules Editor starts.

Step 6: From the panel on the right side, select *Technical* from the dropdown list on the *Tools* tab.

Step 7: Use the *Class* button on the panel to create a new class called *Person*.

Step 8: Select the *Person* class and use the *Attribute* button on the tab to create a new attribute called *roleID*. In the properties panel for the *roleID*, edit its data type by clicking the *Edit* link. Select *Java Class* in the dialog which pops up; enter *Long* as the name and click *Save*.

Step 9: Create another attribute in the *Person* class called *canReadOrWrite*. Its data type will automatically be set to *Boolean*.

Step 10: Use the *Class* button to create a new class called *Factor*. In the properties panel for class, check the *Abstract* checkbox then click on the *Edit* link for the *Extends* field. Use the *Change* link to change the rule set to be *AssessmentRulesInterface* and click *Save*, then choose *AbstractFactor* as the class name and click *Save*.

Step 11: Use the *Rule Class* menu item from the *New* menu to create a new class called *BasicLiteracy*. In the properties panel for class, click on the *Edit* link for the *Extends* field. Select *Factor* as the rule class name and click *Save*.

Step 12: Create a new attribute in the *BasicLiteracy* class called *roleID*. Set its type to be a *Java Class* called *Long*, as with the *roleID* of the *Person*.

Step 13: Create another attribute in the *BasicLiteracy* class called *person*, and set its data type to be the *Rule Class* called *Person*.

Step 14: Double click on the *person* attribute to open its diagram. From the list of palettes on the right of the editor, select the *Technical* palette. Drag a *Search* element from the palette onto the *person* element on the diagram. Select the *Edit Search* action from the dropdown menu on the *Empty Search* icon. Choose *Person* as the *Rule Class* and click *Save*. In the properties panel, select the *Technical* tab and click the *Single Item* option.

Step 15: Select the *New Match* option in the dropdown menu for the *Search* element.

Step 16: Ensure *roleID* is selected as the attribute and click *Save*. From the dropdown menu for the empty rule reference displayed in the diagram, choose the *Edit Reference* option. In the dialog which pops up, ensure *BasicLiteracy* is set as the rule class, then choose *roleID* from the *Use Existing Rule* dropdown list and click *Save*.

Step 17: Create a new attribute in the *BasicLiteracy* class called *reference* and set its data type to be *String*. Double click on the attribute to open its diagram. From the list of palettes on the right of the editor, choose the *Data Types* palette from the dropdown menu.

Step 18: Drag a *String* element from the palette on to the *reference* element on the diagram. Click the *String* element and in the properties panel, enter *BASICLITERACY* as the value for the element.

Step 19: Create another attribute in the *BasicLiteracy* class called *score* of type *String*. Double click on the attribute to open its diagram.

Step 20: From the list of palettes on the right of the editor, choose the *Business* palette. Drag a *Choose* element onto the score element. Choose *String* as the type and click *Save*. Drag a *Compare* element onto the *Empty Condition* of the *When* element.

Step 21: Drag a *Rule* element onto the *Empty Member* of the *Compare* element. In the dialog which pops up, choose the *person* rule and click *Next*. Select the *canReadOrWrite* rule from the dropdown list and click *Save*. Select the equals symbol from the dropdown list that links the newly created canReadOrWrite element with the *Empty Member* element.

Step 22: Then, from the *Data Types* palette, drag a *Boolean* element onto the *Empty Member* element. Set its data type to *String*. From the *Data Types* palette, drag a *String* element onto the *Empty Value* for the result of the *When* and enter 1 as its value. Drag another *String* element onto the *Empty Value* for the *Otherwise* element and enter 0 as its value. Save your rule set.

Step 23: Create another attribute in the *BasicLiteracy* class called *classification*. Set its data type to be a *Code Table Entry* from the code table *ClassDivisionType* and click *Save*. Note that you must select the *ClassDivisionType* code table using the *Codetable Name* field.

Step 24: From the panel on the right side, select the *Templates* tab, then select *Decision Table* from the dropdown list. Drag a *Decision Table* element onto the classification element. In the dialog which pops up, click *Next* then select *score* from the *Use Existing Rule* dropdown list and click *Save*.

Step 25: Expand the *Empty Condition* row in the decision table by double clicking on it to view the *Empty Condition* and *Empty Value* elements. From the panel on the right side, select the *Tools* tab and choose *Data Types* from the dropdown list.

Step 26: Drag a *String* element onto the *Empty Condition* element and in the properties panel, enter a value of 1. Drag a *Codetable* element onto the *Empty Value* element and in the properties panel, select the *ClassDivisionType* code table using the *Codetable Name* field. In the *Codetable Value* field, select *Strength* from the dropdown list.

Step 27: Expand the *Otherwise* row in the decision table by double clicking on it to view the *Empty Value* element. Drag a *Codetable* element onto the *Empty Value* element and in the properties panel, select the *ClassDivisionType* code table again using the *Codetable Name* field. In the *Codetable Value* field, select *Need* from the dropdown list. Save the rule set.

Step 28: Create a new *Rule Class* called *FactorList*. In the properties panel, click the *Edit* link for the *Extends* field and set this class to extend from the *AbstractFactorList* class in the *AssessmentRulesInterface* rule set.

Step 29: Create a new attribute in the *FactorsList* class called *factors*. When setting its data type, choose *Rule Class* in the dialog which pops up; select the *List* checkbox, select *Factor* as the rule class then click *Save*.

Step 30: Create another attribute in the *FactorsList* class called *basicLiteracy*. When setting its data type, choose *Rule Class* in the dialog which pops up, select *BasicLiteracy* as the rule class and then click *Save*.

Step 31: Double-click the *factors* attribute to open its diagram. Drag a *Fixed List* element from the *Technical* palette onto the *factors* element on the diagram. In the dialog which pops up, choose *Rule Class* as the list type and select *Factor*.

Step 32: From the *Business* palette, drag a *Rule* element onto the *Empty Member* element on the diagram. In the dialog which pops up, choose *basicLiteracy* as the rule and click *Save*.

Step 33: Double click on the *basicLiteracy* attribute to open its diagram. Drag a *Create* element from the *Technical* palette onto the *basicLiteracy* element on the diagram and click *Save*. From the *Business* palette, drag a *Rule* element onto the *roleID* element on the diagram.

Step 34: Use the *Change* link to change the rule set to be *AssessmentRulesInterface* and click *Save*, then choose *AbstractFactor* as the current rule class name and click *Save*. Select *roleID* from the *Use Existing Rule* dropdown and click *Save*.

Step 35: Save your rule set and close the tab containing the rules editor (you may choose to validate your rule set to ensure that you have followed the steps correctly).

Step 36: On the **Cúram Express Rule Sets** page, use the *Publish* menu item in the tab menu to publish the new rule set.

Step 37: Use the *Shortcuts Panel* to open the *Intelligent Evidence Gathering* section.

Step 38: Click the *Datastore Schemas* link and use the *New* menu option from the page opened to add a new schema. Fill in the appropriate fields for the schema.

Step 39: Click the *Scripts* link in the *Shortcuts Panel* to open the *IEG* scripts list page. Click the *New* link to create a new IEG script for your assessment.

Step 40: From the IEG scripts page, select the *Open Editor* menu item from the list row actions menu for the newly created script. Select the schema created in step 38 from the drop down of datastores and click on the *Open Editor* button to start editing the IEG script.

Step 41: Select the *Edit* menu option and then *Configure Script Properties*. Set the following IEG fields to the values in the table below:

Table 10: IEG Field Settings

IEG Field	Value
Quit Page	AssessmentScript_exit
Finish Page	AssessmentDelivery_executeAssessment
Config Properties	assessment-ieg-config

If you are dealing with a single page assessment (as is the case here), uncheck the *Show Progress Bar* and *Show Sections* checkboxes.

Step 42: Click the *Datastore Editor* tab in the IEG Editor.

Step 43: Add the IEG domains by clicking on the *Includes* link, select the *Include Schema* button and select *IEGDomains* from the dropdown presented and click OK.

Step 44: Add the assessment entities by selecting the *Add Entity* button inside the *Entities* section. You will need to add a minimum of two entities; Application and Person. These entities must be added for all IEG scripts used by outcome management assessments.

Step 45: Make the *Person* entity a child of the *Application* entity by selecting the *Application* entity, right clicking and select *Add Child Entity*. Select the *Person* entity from the dropdown.

Step 46: Add the following attributes to the *Person* entity by selecting the *Person* entity, right clicking and selecting *Add Attribute*:

Table 11: Person Attributes

Name	Type
personID	SVR_KEY
firstName	IEG_STRING
gender	IEG_GENDER
dateOfBirth	IEG_DATE
roleID	IEG_INT64
participantID	IEG_INT64

Name	Type
questionsApplicableInd	IEG_BOOLEAN

These attributes must be added for all IEG scripts used with Outcome Management assessments.

Step 47: Add the assessment specific entities and attributes, i.e., the attributes required to capture the data entered for your assessment. In this case, we want to capture whether or not the client has basic literacy skills. As this is related to the client, we need to add a *canReadOrWrite* attribute of type *IEG_BOOLEAN* to the *Person* entity. The title of this attribute must be the same as the title of the same attribute added to the *Person* rule class in the CER editor in step 9. Don't forget to save the schema document using the menu item provided by the IEG editor.

Step 48: Set up the IEG script by adding a new section. When the section is created, a page is automatically created for it. Set the title of this page to *New Assessment* (when running the assessment in outcome management this will mean that the series of screens used for this purpose have a common title). Set the *Person* entity as the entity to be used with this page.

Step 49: Drag and drop an *Add Cluster* element from the right side panel onto the page. In the *Cluster Properties* panel, set the Cluster Title to be *Basic Literacy Skills*. Set the *Person* entity as the entity to be used with this cluster. Drag and drop an *Add Question* element onto the newly created cluster.

Step 50: In the *Question Properties* panel, set the *Question Attribute* to be *canReadOrWrite*. Set the Question Label to be '*Are you able to read and write and do basic math?*' Save the script and close the IEG editor.

Step 51: Use the *Shortcuts Panel* to open the *Outcome Management* section. Click the *CER Assessments Configuration* link in this section to open the list of CER assessment configurations.

Step 52: Click the *New CER Assessment Configuration...* link and populate the dialog that is opened with the appropriate information, i.e., the name of the script, datastore and rule set that you added earlier. As we are using scoring to determine the classification, click the *Scoring* checkbox.

Step 53: Return to the *Outcome Management* section in the *Shortcuts Panel*. Click the *Assessment Definitions* link to open the list of assessment definitions.

Step 54: Click the *New Assessment Definition...* action. Enter the name of your assessment and select the assessment configuration created earlier. Select the appropriate categories, in this case *Barrier*.

Step 55: Click the name of the assessment you have just entered in the assessment definition list to open a tab for the assessment. Click the *Roles* navigation tab and select the *New Role...* action to add the assessment role. Enter the name of the role for example, *Primary Caregiver*, and check the *Mandatory* and *Questions Applicable* checkboxes.

Step 56: Open the *Categories* navigation tab. Use the *Add Classification* menu item from the page actions menu to add two classifications, *Strength* and *Need*, for the *Barrier* category.

Step 57: Open the *Factors* tab and use the *New Factor..* menu item to add a new factor. Enter *Basic Literacy* as the factor name. Make sure that you enter *BASICLITERACY* in the Reference field (the same value as entered for the reference attribute in the *BasicLiteracy* CER rule class

specified in step 18). This is required to map the *BasicLiteracy* CER rule class to the assessment factor. Click the name link of the factor entered to open a tab representing the factor.

Step 58: Click the *Classifications* navigation tab and use the *Edit* menu item in the list dropdown menu to set the appropriate range for both of the classifications. In this simple example, the range for the strength classification that equates to an answer of yes to the question regarding basic literacy, is set to from 1 to 1 (a value of 1 is returned from the rules in response to an answer of yes to the question). Similarly, the range for the need classification is set to from 0 to 0 as a value of 0 is returned in response to an answer of no to the question.

Step 59: Return to the *Outcome Management* section in the *Shortcuts Panel*. Click the *Outcome Plans* link and select the *New Outcome Plan...* action from the page opened. Enter the name of the outcome plan, in this case Back To Work, and save the changes.

Step 60: Return to the assessment definition tab that you opened earlier in step 55. Click the *Cases* navigation tab and select the *Add...* link. Select the outcome plan added in the previous step from the list presented. Your assessment is now available to be used from within outcome plans of this type.

For information on creating an outcome plan and running an assessment, see the *Outcome Management Guide*.

Additional technical information

Additional technical information that relates to configuring a CER assessment including rules execution, rules configuration, and IEG configuration.

Rules execution

Pre and post events are raised before and after the assessment rules are executed. Customers have the ability to implement their own assessment engine for executing rules.

- The pre and post events facility allows additional logic to be executed before and after the execution of the assessment rules. The events raised are *AssessmentInstanceEvents.preExecuteAssessment* and *AssessmentInstanceEvents.postExecuteAssessment*.
- By default, both Cúram Decision Assist and Cúram Express Rules rules can be used as the assessment rule engine. However customers can plug in their own rules engine by injecting an implementation of the *AssessmentConfiguration* interface.

Rules configuration

On initiation of the CER rules session, rules objects are created from the data captured in the IEG script and Outcome Management executes the rules session.

- The *DataStoreRuleObjectCreator* class is used to create the rule objects and populate the attributes based on name matching of the entities and attributes in the datastore schema used by the IEG script. For more information about how the class operates, see the *DataStoreRuleObjectCreator Example* section in the *Cúram Express Rules Reference Manual*.
- After the above has occurred, Outcome Management executes the rules session as follows:

  - A rules class named *FactorList* is created, this class must contain a attribute named *factors* which contains a list of the factors configured in the rules.

- For role based assessments the rules are executed for each role that questions were asked of.
- For group based assessment the rules are only executed once.
- For each factor configured in the rules set the following occurs:

  - The *roleID* is populated (this is used to retrieve the person class instance that holds all the answers for that role).
  - The *reference* is retrieved for each item defined in the *factors* attribute of the *FactorList* rules class. The reference value is used to find the assessment factor with the same reference value (Step 42 above describes the set up of an assessment factor). If no factor is found matching the reference, this factor is skipped and the processing moves on to the next factor in the list.
  - The *score* attribute is retrieved from the rule set factor class. If scoring is used, this is where the principle assessment logic is executed. Typically, the rules will use the associated *roleID* to retrieve the answers for that person and determine a score value for the factor based on the answers given.
  - The classification is retrieved for the factor. If scoring is used, this can simply be a blank value. If a classification, rather than a score is to be returned, this is where the principle assessment logic is executed. Typically, the rules will use the associated *roleID* to retrieve the answers for that person and determine a classification for the factor based on the answers given. This classification must match one defined for the assessment factor.
- The results for each factor are stored in the *FactorResults* table.

IEG configuration

A high-level overview of the technical aspects that underpin IEG configuration.

- The root entity must be called *Application*.
- After creation of the root entity, there is a hook point that allows population of entity values before the script starts. The event raised is *AssessmentInstanceEvents.prePopulateDatastore* ; *AssessmentInstance* and *RootEntity* are passed to the event as parameters.
- For role-based assessments, a *Person* entity is used to store the answers entered by each of the people in the assessment. IEG uses the *Person* entity to loop through a list of people displaying an image for each person at the top of the screen. The following attributes are automatically populated on the *Person* entity before the script starts.

Table 12: Person Attributes

Name	Type
personID	SVR_KEY
firstName	IEG_STRING
gender	IEG_GENDER
dateOfBirth	IEG_DATE
roleID	IEG_INT64
participantID	IEG_INT64
questionsApplicableInd	IEG_BOOLEAN

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Table 13: Person Attributes

Name	Type
personID	SVR_KEY
firstName	IEG_STRING
gender	IEG_GENDER
dateOfBirth	IEG_DATE
roleID	IEG_INT64
participantID	IEG_INT64
questionsApplicableInd	IEG_BOOLEAN

- For group based assessments, a *Group* entity is used to store the answers entered during the script. The *Group* entity must have a *groupName* attribute which is automatically populated upon initiation of the script.
- An optional *Assessment* entity can also be specified in the schema. If it is specified, the following attributes will be automatically populated (if defined):

Table 14: Assessment Attributes

Name	Type	Description
initialAssessmentInd	IEG_BOOLEAN	Indicates if the script execution is an initial assessment or a reassessment. For reassessments the user may be given the option to select the factors that are to be reassessed.
assessmentInstanceID	IEG_INT64	The identifier of the assessment instance currently being executed. This can be used to retrieve any additional information about the assessment.
assessmentDefinitionID	IEG_INT64	The identifier of the assessment definition record contains all the configuration information about the assessment.

- After the *Assessment* and either the *Person* or *Group* entities are populated, an event is raised which allows for the population of further entity attributes before the script is started. The event raised is *AssessmentInstanceEvents.postPopulateDatastore* ; the *AssessmentInstance* and *RootEntity* are passed to the event as parameters.

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