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Merative Social Program Management 8.1

What's New

Note

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

Edition

This edition applies to Merative™ Social Program Management 8.0.0, 8.0.1, 8.0.2, 8.0.3, and 8.1.

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Read about new features and updates in Merative™ Social Program Management.

1.1 What's new in Merative™ Social Program Management 8.1

Read about updates and enhancements in Merative™ Social Program Management 8.1, released on 22 June 2023.

For important installation information, and to learn more about product improvements and resolved issues in 8.1, see also the Release Notes.

Updates for caseworkers:

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Updates for administrators:

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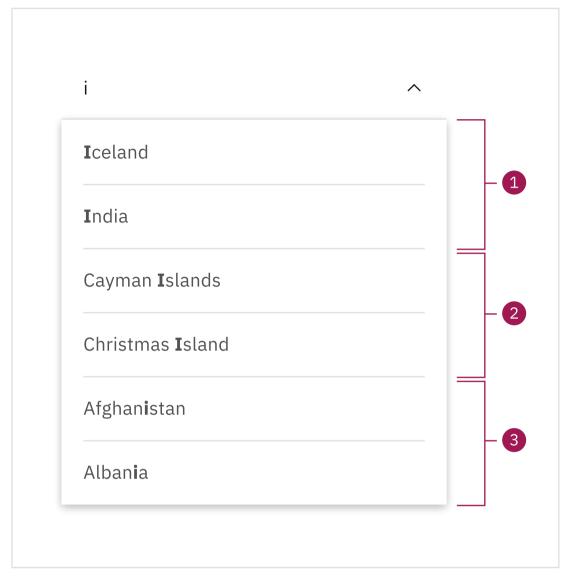
Updates for security:

- Configuring SSO for Social Program Management using Microsoft™ Azure

Removed features

- Code removals

Improved user experience for Combo box dropdown menus

Caseworkers can now select drop-down menu options in fewer keystrokes, with improved sorting and filtering in drop-down menus. Drop-down menus in the caseworker application use a combo-box pattern, which filters the list of options as caseworkers type into the field. The non-IEG drop-down sort and filter mechanism has been enhanced to prioritize and display results as indicated in the following list:

1. Options that start with the characters that are entered are listed, for example, entering 'i' displays Iceland.
2. For options that contain more than one word, words that start with the entered characters are then listed, for example, entering 'i' displays Cayman Island.
3. Options that contain the entered characters are then listed, for example, entering 'i' displays Albania.

Matching characters are highlighted so caseworkers can see why an option was included.

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

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New sort indicator icons for columns

Icons have been added to table headers that show content that can be sorted by selecting the column header. New unsorted, sorted ascending, and sorted descending icons show that the column can be sorted, and the current sort status of the column.

For more information about sortable columns, see the *Web Client Reference Manual*.

Enhanced support for text translation

Administrators can now configure language-specific translations for the following text that is displayed to caseworkers:

- Work queue names
- Quick link names
- Announcement text and comments
- Organization structure name
- Organization unit names
- Position names
- Job names
- Location names
- Location schedule slot names

When text translations are configured, caseworkers can view the information in the same language in which their application is displayed, for example, when they view a list of work queues or search for an organization unit to assign to a task. When caseworkers use the language toggle to change their application language, Social Program Management displays the information in the relevant language based on the user's locale.

For more information, see the following documentation:

- *System Administration Guide*
- *Web Client Reference Manual*
- *Personalized Pod Page Configuration Guide*
- *Workflow Overview Guide*
- *Organization Administration Guide*
- *Location Administration Guide*

Updated documentation to clarify how to configure a refresh of the context panel

A new example has been added to the *Web Client Reference Manual* to describe how administrators can configure a refresh of the context panel when a user submits a specified page from a modal. The example outlines how to refresh the number of outstanding verifications that are displayed in the context panel when a caseworker creates new evidence that requires verification.

For more information, see the *tab tab-refresh element* information in the *Web Client Reference Manual*.

Introducing new financial hook points

Developers can now use the following new financial hook points to implement custom financials processing:

- Third-party deduction hooks to perform custom business processing before and after the creation of third-party deduction instruction line items.

- Instruction line item post insert hook to implement custom business processing such as updating custom entities.
- Payment instrument post insert and post modify hooks to implement custom business processing such as updating custom entities.
- Regenerate instruction line item hook to skip the regeneration of an instruction line item when cancelled payments are reissued.

For more information, see the *Financials Guide*.

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Configuring SSO for Social Program Management using Microsoft™ Azure

Social Program Management provides customer guidance and examples to configure and test a SAML Single Sign On (SSO) reference infrastructure using IBM® Security Access Manager as an identity provider (IdP). The guidance has now been extended to include a step-by-step guide to configure Microsoft Azure as an IdP for SAML SSO and to configure IBM® WebSphere® Application Server as the service provider. For more information, see the *Security Guide*.

Social Program Management has also added new customer guidance to configure OpenID Connect (OIDC)-based SSO using Microsoft Azure as an OIDC provider and IBM® WebSphere® Application Server as a relying party. For more information, see the *Security Guide*.

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Support for Microsoft™ Azure Kubernetes Services (AKS) in development and test environments

We have introduced support for AKS in development and test environments to support clients on their cloud journey.

For more information, see the Merative Social Program Management on Kubernetes Runbook. The runbook is a guide (not a prerequisite), and a starter pack to help engineering teams to deploy Merative Social Program Management on Kubernetes.

The associated Helm Charts and Docker files provided with the runbook in GitHub are a suggested starting point, especially if you are not familiar with the architecture and constructs referenced in the runbook.

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Removal of deprecated features

The Social Program Management product development team continue to optimize the application by removing previously deprecated features. Removing deprecated features ensures that we maintain a lean product, which enables us to focus on delivering business value. For more information about the removed functionality, see the *Product Overview*.

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1.2 What's new in Merative™ Social Program Management 8.0.3

Read about updates and enhancements in Merative™ Social Program Management 8.0.3, released on 2 March 2023.

For important installation information, and to learn more about product improvements and resolved issues in 8.0.3, see also the Release Notes.

Updates for caseworkers:

- Support for editable notes and contact log narratives
- New contact subject for contact logs and enhanced search
- Application-wide improvements to actions menus on page 14
- Support for autorecovery on page 14

Updates for administrators:

- User locale-based support for currency symbol placement and spacing
- Improvements to Content Management Interoperability Services integration

Updates for developers:

- Applying deductions to underpayments that are created in benefit cases
- Updated documentation to clarify the steps to build and deploy outbound REST APIs

Support for editable notes and contact log narratives

Caseworkers can now update the text of any notes or contact narratives they create or append to for a specific editable period that is set by an administrator. Caseworkers can make unlimited changes to their text during the editable period, giving them more time to write up and correct the details without fear of losing the information or saving an incomplete record.

When editing a note, or a contact narrative in the contact log, caseworkers can now see the history of previous addendums to the note or the narrative in the edit modal. The history allows caseworkers to recap on the previously entered information.

For more information about editing notes, see the *Integrated Case Management Guide*. For more information about editing contact narratives, see the *Investigations Guide* and the *Child Services Business Guide*. For more information about configuring notes and contact logs, see the *System Administration Guide*.

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New contact subject for contact logs and enhanced search

Caseworkers can now enter a contact subject when they record a contact in the contact log, in addition to entering other contact information. By entering a subject, caseworkers can provide more insight into what the contact is about.

To make it easier to find a contact quickly, especially if there are hundreds of contacts on a case, caseworkers can also search both the new subject field and the existing narrative for specific text. The search returns contacts that contain any of the words that the caseworker entered. The search also finds matches that contain similar words. In the search results, the caseworker can easily see where the words were found, in the subject or the narrative, or in both. In an expanded row in the search results, the caseworker can also see exactly where in the narrative the words were found.

For more information about searching for contacts, see the *Participant Guide* and the *Child Services Business Guide*. For more information about configuring contact logs, including enabling the new contact subject field, see the *System Administration Guide*.

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Application-wide improvements to actions menus

Improvements have been made to how actions menu items are displayed and selected for all tab, page, and row level actions menus throughout the application. Users can now be provided with access to the most important actions directly on the tab, page, or row level itself rather than being required to navigate to and select an action from within an actions menu.

The application can be configured to surface the most important actions in all actions menus across the application or on a tab, page, and row level basis. When this feature is enabled, the first few items in actions menus are surfaced as inline menu items. Based on the analysis of key business flows, you can then further configure the actions menu items that you want to display inline. You can configure the number of actions to display inline on an application-wide or an individual actions menu basis, and reorder menu items so that the most important actions are displayed.

For more information about inline menu items on actions menus, see the *Web Client Reference Manual*.

Support for autorecovery

Social Program Management now provides support for the autorecovery of data within modals when there is a system interruption, such as a session timeout. Now, when caseworkers log back in to the application after an interruption, they are immediately returned to the screen that they were on before the interruption. Any data that caseworkers had entered is restored, which means that no data is lost, and they can continue from where they stopped before the interruption.

For more information about autorecovery, see the *Web Client Reference Manual*. For information about configuring autorecovery, see the *System Administration Guide*.

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User locale-based support for currency symbol placement and spacing

Administrators can now configure whether the placement and spacing of the currency symbol that is displayed for monetary amounts are determined based on the user's locale or by system-wide settings.

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

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Improvements to Content Management Interoperability Services integration

The following improvements have been made to the Content Management Interoperability Services (CMIS) integration functionality that Social Program Management uses to integrate with a Content Management System (CMS):

- To support the CMIS 1.1 specification, the version of the Apache Chemistry client that the CMIS infrastructure uses has been upgraded from 0.7.0 to 0.9.0.

- Support for the browser binding model is now available when an administrator configures CMS service settings for a CMS target system.

For more information, see the *Content Management Interoperability Services Integration Guide*.

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Applying deductions to underpayments that are created in benefit cases

During case reassessment, financials processing can create underpayments in the original benefit case and in a separate payment correction case. However, deductions can be applied only to underpayments in a payment correction case. Developers can now use new customization points to instruct financials processing to apply deductions to underpayments that are created in the original benefit case.

Enabling the application of deductions to underpayments in the benefit case instructs financials processing to allocate the amounts that are deducted from underpayments towards outstanding overpayments. As a result, agencies do not need to create separate payment correction cases to manage the underpayments. The number of payment correction cases that caseworkers must manage is reduced, which can save time, and supports a more simplified view of a client's payments.

For more information about the new deductions customization points, see the *Financials Guide*. For more information about deductions financial component processing, see the *Inside Eligibility and Entitlement Using Cúram Rules Guide*.

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Updated documentation to clarify the steps to build and deploy outbound REST APIs

Updated documentation is now available that better describes the steps that developers need to follow to add additional third-party JAR files when developing and deploying outbound REST APIs. The list of required third-party JAR files has been revised.

For more information about how to build and deploy outbound REST APIs, see the *Social Program Management REST API Guide*.

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1.3 What's new in Merative™ Social Program Management 8.0.2

Read about updates and enhancements in Merative™ Social Program Management 8.0.2, released on 19 May 2022.

For important installation information, and to learn more about product improvements and resolved issues in 8.0.2, see also the Release Notes.

Updates for caseworkers:

- New language toggle
- Support for Swedish language

Updates for developers:

- New customization points for product delivery case lifecycle processing

- New customization point for prepopulating extra person data during application creation
- New customization point for application case authorization processing
- Updated documentation to clarify the purpose of the default logic for user password validation
- Introducing new guidance for developing outbound REST APIs

Security update

- Extending SAML SSO to enable multifactor authentication

What's new for other versions:

- What's new in 8.0.0
- What's new in 8.0.1
- What's new in 8.0.3
- What's new in 8.1

New language toggle

Caseworkers can now change the language in which their Social Program Management application is displayed. A new configurable **Language** menu item is now available in the application menu. If configured, caseworkers can use the language toggle to change their application language to any language that is installed on the system.

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

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Support for Swedish language

The following support for the Swedish language is now available:

- A Swedish language pack
- The ability for an administrator to set a user's default locale to Swedish
- The ability for a caseworker to change their user interface language to Swedish

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New customization points for product delivery case lifecycle processing

New customization points are now available to support compliant customization of the following processes in the product delivery case lifecycle:

- Case submitted for approval
- Case approval
- Case rejection
- Case activation
- Case closure
- Case reactivation

For more information, see the *Inside Eligibility and Entitlement Using Cúram Express Rules Guide*.

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New customization point for prepopulating extra person data during application creation

When a new application is created for a registered person, the application form is prepopulated with person data that is available on the system.

To support the ability to prepopulate extra person attributes on the application form in a compliant manner, a new customization point is now available.

For more information, see the *Intake Configuration Guide*.

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New customization point for application case authorization processing

During application case authorization, if the applicant is a member of an existing integrated case, caseworkers can create a new integrated case or associate the new application with the existing integrated case. If a caseworker selects an existing integrated case, new product delivery cases are automatically created during the authorization process and associated with the integrated case.

To support the ability to reuse an existing product delivery case on the selected integrated case in a compliant manner, a new customization point is now available.

For more information, see the *Intake Configuration Guide*.

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Updated documentation to clarify the purpose of the default logic for user password validation

Updated documentation is now available that describes the intended usage of the default logic to validate and update a user's password.

For more information, see the *Security Guide*.

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Introducing new guidance for developing outbound REST APIs

Developers can use outbound API requests to integrate Social Program Management with external applications that expose a REST API. New guidance is now available on how to develop outbound REST APIs by using the Jersey REST client library to make the outbound requests.

For more information, see the *Social Program Management REST API Guide*.

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Extending SAML SSO to enable multifactor authentication

Social Program Management provides customer guidance and examples to configure and test a SAML SSO reference infrastructure on Kubernetes, WebSphere® Application Server, and Oracle WebLogic Server. The SAML SSO reference infrastructure is configured with a regular single factor username and password authentication, that provides only a basic level of identity authentication. To provide a stronger authentication experience, you can configure the authentication flow to include multifactor user authentication.

The guidance has been extended to include a step-by-step guide to extend the SAML SSO reference infrastructure to enable and verify multifactor authentication by using IBM® Secure Verify Access. For more information, see the *Security Guide*.

1.4 What's new in Merative™ Social Program Management 8.0.1

Read about updates and enhancements in Merative™ Social Program Management 8.0.1, released on 25 November 2021.

For important installation information, and to learn more about product improvements and resolved issues in 8.0.1, see also the Release Notes.

Updates for caseworkers:

- Evidence change history improvements on page 18
- Enhanced verification engine processing on page 18
- Improved filtering for Carbon dropdowns on page 19
- New in Merative SPM Universal Access on page 19

Updates for developers:

- Introducing the ability to extend UIM by using Carbon, React, GraphQL, and Apollo Client on page 19
- Enhanced data-testid attribute format for user interface test automation on page 20
- Introducing new customization point for product delivery case approval processing on page 21

What's new for other versions:

- What's new in 8.0.0
- What's new in 8.0.2
- What's new in 8.0.3
- What's new in 8.1

Evidence change history improvements

Improvements to how information is displayed in the change history for evidence have been introduced. Caseworkers now have a more consistent view of the information regardless of where in the application they view the evidence. In addition, caseworkers can more reliably see which users made each update to the evidence over time. For more information, see the *Understanding Evidence Guide* and *WorkItem:273340* in the 8.0.1 Release Notes.

Enhanced verification engine processing

The way that verification engine processing works during product authorization has been enhanced. When evidence is captured for an integrated case for use by product delivery cases, and verifications are configured at the product delivery case level, the verifications are created during product authorization. During the process, the status of each verification that is created is determined.

An improvement was made to help optimize product authorization, when an integrated case has a large amount of evidence of the same type that requires verification at the product delivery case level. Now, as each new verification is created, the status of only that verification is determined. Previously the status of all existing verifications for the evidence type was evaluated.

For more information, see *WorkItem:273436* in the 8.0.1 Release Notes.

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Improved filtering for Carbon dropdowns

Two significant usability improvements have been made to the Carbon dropdowns that are used in the Social Program Management application. These improvements help caseworker to quickly find and select options.

- Options in the dropdowns are now filtered based on input that caseworkers type into the dropdown.
- Option in the dropdown are also filtered to show all options that contain the typed input, based on the `contains` filter method. Dropdowns in v7 were filtered based on 'Starts with'.

Intelligent Evidence Gathering (IEG) has not been updated to use Carbon, so it does not use the Carbon dropdown.

For more information about the UIM FIELD element, see the *Web Client Reference Manual*.

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New in Merative ™ SPM Universal Access

For more information about what's new in Merative ™ SPM Citizen Engagement, see the *Merative™ SPM Universal Access Responsive Web Application Guide* .

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Introducing the ability to extend UIM by using Carbon, React, GraphQL, and Apollo Client

A new open source repository on GitHub provides a JavaScript™ development environment. Developers can extend UIM by using the latest JavaScript™ user interface front-end tools and libraries.

Social Program Management developers can now:

- Use a lightweight JavaScript development environment that complements the existing web client development environment.
- Develop complex views with the latest front-end tools and libraries, and integrate them into their Social Program Management web client.
- Develop front-end content quickly and iteratively. JavaScript™ developers can view their changes without a client build.
- Use GraphQL and Apollo Client to configure complex data queries.
- Build robust front-end content through easier test automation.

The Social Program Management UI Addon Development Environment provides:

- Documentation: Instructions to get up and running in a JavaScript™ environment, with examples and design guidance.

- Samples: For example, a sample React component that contains IBM® Carbon styles and GraphQL queries.
- Storybook: Developers can use Storybook to render the sample component locally.
- Code: Commands to integrate your compiled JavaScript™ into the Social Program Management user interface.

The `spm-ui-addon-devenv` repository contains links to the following packages:

- IBM® Carbon Design System, which is the IBM® open source design system. It consists of working code, design tools and resources, and human interface guidelines. For more information, see [IBM® Carbon Design System](#).
- React, which is an open source JavaScript™ library that enables developers to build human-centered user interfaces.
- GraphQL, which is an open source data query language that enables developers to query and configure complex data queries that aggregate information from different database entities.
- Apollo Client, which is an open source library that enables GraphQL developers to manage information state. Apollo Client provides the infrastructure for caching data.

For more information, see https://merative.github.io/spm-ui-addon-devenv.

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Enhanced `data-testid` attribute format for user interface test automation

The `data-testid` attribute was introduced in 8.0.0 to improve the user interface (UI) automated testing experience. The attribute has been enhanced with the introduction of a new format that concatenates the label to the UIM component prefix. The improvement helps you to target specific UI components in a UI automation test framework.

The Date and Date Time components, which previously used the `data-test-id` attribute, now use the new `data-testid` attribute format. The dropdown component was updated to use the `data-testid` attribute.

The following UIM components and add-ons now use the new format `data-testid` attribute in the Social Program Management 8.0.1 user interface:

- Cluster
- Checkbox
- Text input
- Text area
- Dropdown
- DatePicker
- DateTime
- TimePicker
- Multiselect Checkbox
- Modal buttons, such as **Next**, **Cancel**, **Back**, or **Submit**.
- Search popup
- Log in and log out buttons, which are custom additions of the attribute only to support automation.

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

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Introducing new customization point for product delivery case approval processing

A new customization point is now available to support compliant customization of the function that sets the case header effective date during product delivery case approval.

For more information, see the *Inside Eligibility and Entitlement Using Cúram Express Rules Guide* and *WorkItem:273624* in the 8.0.1 Release Notes.

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1.5 What's new in Merative™ Social Program Management 8.0.0

Read about updates and enhancements in Merative™ Social Program Management 8.0.0, released on 29 July 2021.

For important installation information, and to learn more about product improvements and resolved issues in 8.0.0, see also the Release Notes.

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- Virtual assistant support in the caseworker application on page 23
- Improved Word Integration Assistant on page 23
- Evidence broker improvements on page 23
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- [Code removals on page 29](#)

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- [What's new in 8.0.2](#)
- [What's new in 8.0.3](#)
- [What's new in 8.1](#)

User interface improvements

The Social Program Management user interface has been updated with caseworker productivity and accessibility in mind. New global styling changes to typography, color, and icons provide an immediate benefit to the user experience, and help caseworkers to read screens more easily.

Social Program Management is incrementally adopting components from the open source [IBM® Carbon Design System](#), with many existing components replaced with Carbon equivalents in the 8.0 release. The improved and fully accessible components help caseworkers work more efficiently, and provide a more satisfying user experience.

Modals were a key focus area, as caseworkers use them daily for data entry throughout the application. Improved dropdowns, date interactions, and buttons with increased click space are now easier for caseworkers to use. Text input controls, checkboxes, and search pop-up controls have also been improved. The components are fully responsive to preserve the caseworker experience across devices, and to enable caseworkers with a reduced screen size to have multiple documents or screens open simultaneously for data entry.

New layouts, with labels over fields, provide an effective use of space and help caseworkers focus on content. Lists have been improved, with dynamic distribution of widths based on the content for improved readability. The system-wide improvements can help all caseworkers to efficiently deliver benefits and services to citizens.

For test automation purposes, a new attribute is included in the rendered HTML of the user interface in the 8.0 release. The attribute `data-testid` has been added to the HTML for the UIM components that were updated for the 8.0 release. The addition of this new attribute in the HTML makes these UI components more easily and uniquely identifiable for the automation frameworks that target them. The improvement enables easier targeting of specific UI components in automated framework selectors, which in turn improves the automation script and framework maintenance and robustness. The result is that less effort is required when you upgrade to future product versions.

For more detailed information about user interface changes, see the *Web Client Reference Manual* and the *Look and Feel* section in the release notes.

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Caseworker experience improvements

A case overview is now available to address the need for caseworkers to quickly identify key information in an integrated case. The new **Overview** tab on integrated cases is designed to consolidate the most important case information into cards on a single view, which improves the caseworker experience and productivity.

In the 8.0 release, the case overview contains a configurable Entitlements card that provides caseworkers a concise summary with high-level information about eligibility, entitlements, and payments across multiple benefits on a case.

For cases with payments, details about the latest payment and expected next payment are presented in an intuitive manner. Caseworkers can expand the payment summaries to see the benefit components, deductions, and overpayments or underpayments. Further links are provided, so caseworkers can go directly to the full details in the application if needed.

For more information about enabling and configuring the case overview tab, see the *Integrated Case Management Guide*.

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Virtual assistant support in the caseworker application

Social Program Management now provides support for secure integration with IBM® Watson™ Assistant. Caseworkers can now get answers to case specific queries, which reduces the time required to complete tasks. In addition, caseworkers are supported with workflow and process guidance.

Customers can now customize a virtual assistant to link relevant Social Program Management data into caseworker conversations. A new GitHub repository provides sample content and guidance for a caseworker virtual assistant. The content can be used as a starting point to build custom content and includes the following sample use cases:

- Querying data, for example, asking about outstanding verifications on a case or client.
- Caseworker procedures, for example, asking how to update client details for a specific change of circumstance.

For more information about the sample content, see https://merative.github.io/spm-chatbot

For more information about secure integration with IBM® Watson™ Assistant, see the *Integrating with IBM Watson® Assistant Guide*.

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Improved Word Integration Assistant

The Word Integration Assistant client desktop Java™ application enables users to edit Microsoft™ Word documents through the Social Program Management application. Support for the latest Microsoft™ Edge browser based on Chromium has been added. The installation process has been improved to make it easier to install the Word Integration Assistant and enhanced troubleshooting capabilities have also been provided.

For more information, see the *System Administration Guide*.

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Evidence broker improvements

Caseworkers can now use an enhanced Evidence Comparison View page to process incoming evidence that is comparable to existing evidence. The enhanced view provides caseworkers with the capacity to process the incoming evidence in one step by using a new **Update** action. New cards and confirmation modals, along with an enhanced timeline of changes view, help to guide caseworkers through the process based on the evidence that is being compared.

For more information, see the *Evidence Broker Guide*.

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Employer search improvements

When users are recording employments for a participant, users must search for and select a registered employer. Previously, prospect employers were always returned in the search results, even though users cannot use prospect employers to record an employment. The employer search has been enhanced to allow a user to indicate whether to return prospect employers in the search results.

For more information, see the *Participant Guide*.

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Sharing eligibility data between non-MAGI Medicaid and MAGI Medicaid programs uses a new case groups-based approach

MAGI Medicaid eligibility can be denied where an individual is determined eligible for a non-MAGI Medicaid program (Traditional Medical Assistance). To support the requirement, information about the eligibility decisions on an Income Support case must be shared to an Insurance Affordability case that the MAGI Medicaid rules uses to determine eligibility. How eligibility information is shared between Income Support non-MAGI Medicaid and Insurance Affordability MAGI Medicaid has been enhanced.

Previously, eligibility information between Income Support non-MAGI Medicaid and Insurance Affordability MAGI Medicaid was shared by using evidence to represent the eligibility decisions on an Income Support case. A new case groups-based approach has been introduced to store and share eligibility data for non-MAGI Medicaid programs, for use by MAGI Medicaid rules when determining eligibility.

Using a case groups-based approach to share eligibility data, rather than an evidence-based approach, enhances how Social Program Management implements and maintains cascading eligibility. A case groups-based approach is also consistent with how other areas of Social Program Management share eligibility.

A hook point has also been introduced to enable organizations to control the non-MAGI Medicaid programs that the MAGI Medicaid rules use. Organizations can also use the hook point to determine where to store eligibility data.

For more information, see the *Income Support Business Guide*.

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Improved summary PDF

A new template that you can use to create an improved PDF summary of the information that is entered by citizens during an online application is now available. The new `IntakeApplicationPDFTemplate.xsl` template uses the summary page in Intelligent Evidence Gathering (IEG) scripts to generate the PDF summary form. You can also customize the header and logo for your organization. To benefit from the improved PDF summary, you must configure your system to use the new template. For more information, see the *Merative™ SPM Universal Access Responsive Web Application Guide* .

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New in Merative ™ SPM Universal Access

For more information about what's new in Merative ™ SPM Citizen Engagement, see the *Merative™ SPM Universal Access Responsive Web Application Guide*.

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Making it easier to add a product in Health Care Reform

`HealthCareProductManager` is the business interface that creates and maintains products within the Health Care Reform cascade. Adding a custom product to the Health Care Reform cascade requires an implementation of `HealthCareProductManager` and, within the implementation, the creation and maintenance of the product delivery and case groups records.

The following list outlines the new class and interface that have been introduced to make the implementation of `HealthCareProductManager` easier:

- `HealthCareProductManagerHelper` is a new class that provides developers with methods to create and maintain product delivery cases.
- `HCRCaseGroupsRuleReference` is a new interface that custom products can implement. Custom products specify the Cúram Express Rules (CER) that represent the case groups of type member and benefit. The Health Care Reform infrastructure then maintains the case groups of type member and benefit as part of the `maintainCaseGroups` method that is provided in `HealthCareProductManagerHelper`.

For more information, see the *Merative™ SPM Income Support for Medical Assistance (Health Care Reform) Developer Guide*.

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Optimizations for Cúram Express Rules (CER) reassessment

The way that Cúram Express Rules (CER) reassessment processing works has been enhanced. The following list outlines the improvements to help optimize the reassessment of cases that are long lived and have much static evidence with many changes:

- Evidence Descriptor caching is now used when retrieving static evidence.
- Data from the EvidenceChangeHistory and AprovalRequest tables that is not required for reassessment is no longer being read.

You can use application properties to disable both optimizations. For more information, see the *Inside Eligibility and Entitlement Using Cúram Express Rules Guide*.

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Intelligent Evidence Gathering (IEG) logging improvement

New logging functionality has been added to the IEG engine that you can use, in particular, to analyze unexpected exceptions. You can deploy the logging functionality at any stage during the execution of an IEG script.

The logging function prints a message to the server logs in the following format:

```
================================================
Script Execution Failed - Current Script Details:
================================================
Script ID : ...
Script Version : ...
Script Type : ...
Question Page ID : ...
================================================
```

The functionality is called when a `NoSuchElement` exception occurs in the IEG engine. The functionality is accessible anywhere in the IEG engine if the script execution details can be accessed, so you can deploy the logging functionality wherever new exceptions occur.

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New milestone delivery batch processes use batch streaming infrastructure

The new batch processes `ScanMilestoneDeliveryStartDateBatch` and `ScanMilestoneDeliveryEndDateBatch` replace the existing `ScanMilestoneDeliveryStartDate` and `ScanMilestoneDeliveryEndDate` batch processes. While the new batch processes provide the same functionality, they use the batch streaming infrastructure that permits the defining of processing chunks and provides a better fail-over strategy.

The existing `ScanMilestoneDeliveryStartDate` and `ScanMilestoneDeliveryEndDate` batch processes have been deprecated.

For more information about the new batch processes, see the *Batch Process Reference Guide*. For more information about the deprecated batch processes, see .

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Introducing Apache Log4j 2 support

Because Log4j 1.x has reached end of support, the logging framework that is used in Merative™ Social Program Management has been upgraded to Apache Log4j 2. For more information, see https://logging.apache.org/log4j/2.x/

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Introducing new externalized APIs and classes to support customization

A set of APIs and classes in the following areas that were previously classified as restricted have been externalized. You can now extend and call the following APIs compliantly from custom implementations:

- Health Care Reform annual renewals processing
- Health Care Reform electronic verification data processing
- Health Care Reform interfaces
- Health Care Reform plan management integration
- Case home page menu
- Intake address data processing

For more information about the classes that have been changed in each case, see the Release Notes.

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Introducing support for shared Enterprise Java™ Beans (EJB) persistent timer tables for WebSphere® Liberty

Social Program Management has been enhanced to support shared EJB persistent timer tables for WebSphere® Liberty. The timer tables store timer information for Social Program Management timers that are created from the application.

The original Social Program Management timer infrastructure design is based on traditional deployments of IBM® WebSphere® Application Server and Oracle WebLogic Server. A separate timer table is created for each Java™ Virtual Machine (JVM) in an on-premises deployment, and a relatively small number of static timer tables are created.

However, a deployment of WebSphere® Liberty on Kubernetes is more dynamic, where pods are created and destroyed based on system demands. If the original timer design is used in WebSphere® Liberty, timer tables would be created each time that a pod starts. Therefore, orphan timer tables would build up in the database, and a database administrator would have to remove the orphan tables.

The introduction of shared timer tables in WebSphere® Liberty drastically reduces the number of associated timer tables that would otherwise be created in such a deployment. Therefore, a database administrator does not need to manage the timer tables.

The use of timer tables in traditional IBM® WebSphere® Application Server and Oracle WebLogic Server deployments is unchanged.

Performance tuning guide moved to a GitHub runbook

To unify on premises and cloud performance tuning information, the performance tuning guide has been removed from the documentation. Instead, a single on premises and cloud performance tuning runbook has been published in a GitHub repository. For more information, see https://merative.github.io/spm-performance-tuning/.

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Removal of Adobe™ Flash dependencies for editors

You can remove Adobe™ Flash dependencies for Social Program Management by downloading and installing the Editor Applications software asset. For Social Program Management 7.0.0 or later, the asset enables stand-alone versions of editors that previously needed Flash support in the browser.

The following editors were updated:

- Cúram Express Rules (CER) editor
- Data Mapping editor
- Data Store editor
- Intelligent Evidence Gathering (IEG) editor
- Decision Matrix editor
- Dynamic Evidence editor

For more information, see the *Development Environment Installation Guide*.

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Removal of Adobe™ Flash dependencies for charts and widgets

Charts and widgets based on Adobe™ Flex have been replaced with responsive versions based on modern React JavaScript™ components. The current functionality of the charts and widgets has been maintained for existing customers, with enhanced accessibility where appropriate. A new color scheme from the IBM® Carbon Design System provides an accessible and enhanced user experience.

The following charts and widgets have been updated to improve the user experience and to make them accessible:

- The Citizen Context Viewer (CCV) widget
- The Enhanced Client Selection widget
- The Create Social Enterprise Folder widget
- The Assessment Delivery Details chart
- The Assessment Tracking chart
- The Factor Activities widget
- Horizontal Bar charts

For more information, see the Social Program Management has removed Adobe Flash dependencies in 2020 technote.

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Configuring SSO for Oracle WebLogic Server

Social Program Management currently provides customer guidance to configure SAML Single Sign On (SSO) with IBM® WebSphere® Application Server and WebSphere® Application Server Liberty. The guidance has now been extended to include Oracle WebLogic Server. The documentation provides a step-by-step guide to configure SSO with WebLogic Server.

For more information, see the *Security Guide*. The documentation includes Service Provider (SP) and Identity Provider (IdP) initiated Social Program Management and Universal Access SSO flows.

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Securing the XML server

To enhance communication security, particularly in distributed environments, communication between the Social Program Management application and the XML Server has been updated to use a TCP/IP connection over TLS 1.2 (Transport Layer Security) socket. For more information, see the *XML Infrastructure Guide*.

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Enhanced cross-site request forgery (CSRF) protection

Enhanced Cross-Site Request Forgery (CSRF) hardening has been included in version 8.0.0. The Social Program Management user interface (UI) infrastructure has been enhanced by adding extra security measures to further protect Social Program Management against CSRF. Only requests from trusted domains are permitted. For more information, see the *Security Guide*.

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Code removals

The Social Program Management product development team continue to optimize the application by removing previously deprecated features. Removing deprecated features ensures that we maintain a lean product, which enables us to focus on delivering business value.

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2 Release notes

Detailed release notes describe what is new and changed for each release. The defects that are fixed in each release are listed.

Review the release notes for your version before installation or deployment, and before you start to configure or customize Merative™ Social Program Management applications, see the [Merative Support Docs site](#).

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