Merative™ Social Program Management 8.0.4

Mapping Logically Equivalent Evidence Attributes Guide

Note

Before using this information and the product it supports, read the information in Notices *(on page xxvi)*

Edition

This edition applies to Merative™ Social Program Management .

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Chapter 1. Mapping Logically Equivalent Evidence Attributes

During the implementation of the evidence broker enhancements in Social Program Management v7.0.2, we analyzed the evidence that is provided in a default installation with Insurance Affordability and Income Support to identify the logically equivalent evidence. Sharing rules XML files that are required to configure the sharing of the logically equivalent evidence are provided for customers to use or to consider in their analysis of logical equivalence.

The intention in the following sections is to give an insight into the mappings that are provided for the logically equivalent evidence, and also any special considerations or actions that must be performed to share the evidence. However, the detail is really in the sharing rules XML file. Individual sharing rules XML files must be specified for each direction of sharing and between each end point. The following sections describe the mappings that are required for sharing evidence in a single direction, and also any unique actions or considerations that relate to sharing the logically equivalent evidence. Typically, the reverse attribute mapping can be applied to the sharing rules XML file in the opposite direction. However, the sharing rules XML file provides the real detailed information for sharing logically equivalent evidence in each direction.

For example, SSN details to Identifications evidence is described one time even though the evidence can be shared from Insurance Affordability application cases to persons, or from Insurance Affordability integrated cases to persons. Likewise, the evidence can be shared in the opposite direction from persons to Insurance Affordability application cases, and from persons to Insurance Affordability integrated cases, and so on.

The code table mappings are not listed in the following sections. Again, the detailed information is available in each sharing rules XML file. Some examples are highlighted in the following sections, but the examples are not intended to be an exhaustive list of code table mappings. In summary, if an attribute to be mapped is of type code table, then to map that data each code table value with logical equivalence between the source and the target cases must be listed in the sharing rules XML file. Similarly, if you use the same code table on both the source attribute and the target attribute, then you must specify each code table value in a code table mapping.

Identifications and SSN details evidence types

The sharing rules XML file for mapping identifications and SSN details evidence is provided in the Insurance Affordability solution for sharing SSN details evidence from an Insurance Affordability case to person level identifications evidence. For example, an administrator can configure the broker to share social security number evidence from an Insurance Affordability case to identifications evidence for

a person. Likewise, an administrator can configure the broker to share identifications evidence from a person's evidence to an Insurance Affordability case.

The following table shows how, in a sharing configuration, an administrator can map a subset of attributes between the identifications evidence and the SSN details evidence:

Table 1. Mapping of identifications evidence to SSN details evidence

Identifica-tions evidence	SSN details evidence
participant	participant
alternateID	alternateID
altIDType	altIDType
fromDate	fromDate
toDate	toDate

The SSN details evidence also contains the attributes `ssnStatus`, `noSSNReasonCode`, `noSSNReason`, and `OtherDetails`. However, they are not mapped in the sharing configuration because a potential mapping does not exist for the attributes. The identifications evidence also contains a `preferredInd` attribute, but it is not mapped in the sharing configuration.

The data type of the mapped attribute `altIDType` is code table. The `altIDType` attribute on both the identifications evidence and the SSN details evidence references the same `ConcernRoleAlternateID` code table. Therefore, in the sharing rules XML file, an administrator can map the code table value `CA1` that relates to the social security number evidence for both the identifications evidence and the SSN details evidence, as shown in the XML samples.

Table 2. Mapping the altIDType attribute between identifications evidence and SSN details evidence through the `ConcernRoleAlternateID` code table

Identifications evidence code table value	SSN details evidence code table value
CA1 Social Security Number	CA1 Social Security Number

With the previous configuration, when a caseworker enters a value for social security number on either identifications evidence or on SSN details evidence, it is shared as identical when the broker shares evidence between the two evidence types.

Filtering an evidence subcategory

Identifications evidence can keep a range of identifications, so use an evidence subtype to ensure you map the correct identification. In this scenario, the identifications subtype is the social security number.

See the `Filter` XML element in the sample sharing rules XML schema for information about identification evidence subcategories that you can use for the identifications evidence type.

Relationships evidence types

Logically equivalent evidence sharing configurations can map relationship types across cases. Relationships can be shared between Income Support cases, Insurance Affordability cases, and persons.

Sharing relationships

The broker can be configured to share relationships between Insurance Affordability cases and person evidence to ensure that relationship details, such as marriage, are included on all related cases. When the broker shares a relationship from a source case to a target case, the system creates the relationship on the target case according to the rules that are defined in standard evidence maintenance. Therefore, the system creates reciprocal evidence if it is required.

Sharing a relationship from a case to persons example

For example, an administrator has set up a logically equivalent sharing configuration to share household relationship evidence on Income Support integrated cases to relationships evidence on person evidence. The household relationship evidence is configured as a trusted source on the target case.

A caseworker creates an Income Support integrated case, and adds Mary Smith and her child Jane Smith as registered participants. The system creates the following relationship evidence on the Income Support integrated case:

- The system creates household relationship evidence that specifies Mary Smith as the parent of Jane Smith.
- The system also creates reciprocal household relationship evidence that specifies Jane Smith as the child of Mary Smith.

The broker then shares the relationship from the Income Support integrated case to the person evidence for both Mary Smith and her child Jane Smith. The system creates the following relationship evidence:

- The system creates relationship evidence on Mary Smith's person evidence that specifies Jane Smith as her child and includes Jane Smith's date of birth.
- The system creates relationship evidence on Jane Smith's person evidence that specifies Mary Smith as her parent.

Sharing a relationship from a person to a case example

For example, an administrator has set up a logically equivalent sharing configuration to share relationships evidence from person evidence to member relationship evidence on Insurance Affordability integrated cases. The relationships evidence is configured as a trusted source on the target case.

A caseworker registers John Smith and his child Bob Smith. The system creates the following relationship evidence:

- The system creates relationship evidence on John Smith's person evidence that specifies Bob Smith as his child and includes Bob Smith's date of birth.
- The system creates relationship evidence on Bob Smith's person evidence that specifies John Smith as his parent.

The caseworker creates an Insurance Affordability integrated case for John Smith and adds application details evidence for both John Smith and his child, Bob Smith. The broker shares the relationship from John and Bob Smith's person evidence to their Insurance Affordability integrated case. The broker then creates member relationship evidence on the Insurance Affordability integrated case that specifies John Smith as the parent of Bob Smith.

Mapped relationship attributes

The evidence type for persons is relationships. On Income Support cases, relationships are stored in household relationship evidence, and on Insurance Affordability cases, relationships are stored in member relationship evidence. The attribute mappings for sharing between the evidence types are similar. Table 3: Insurance Affordability case member relationship to person evidence relationship attribute mapping *(on page 9)* shows a sample mapping to share Insurance Affordability member relationship evidence to relationships evidence for persons.

Code table value mappings are required for each relationship type. Table 4: Example to show member to person evidence relationship attribute mapping for a parent relationship *(on page 9)* shows an

example code table value mapping to share the `parent` relationship type between a mother and child from Insurance Affordability member relationship evidence to relationships evidence at the person level. However, for each logically equivalent relationship type, you must specify the code table value mapping in the sharing rules XML file. You must specify a sharing rules XML file for each specific relationship flow; for example, Insurance Affordability member evidence to person relationship evidence, Income Support household relationship evidence to person relationship evidence, and so on.

Two features that are unique to the sharing of relationship evidence are discussed in Relationship reciprocity *(on page 10)* and Sharing relationships to person evidence *(on page 10)*.

Table 3. Insurance Affordability case member relationship to person evidence relationship attribute mapping

Insurance Affordability member relationship attributes	Person evidence relationship attributes
caseParticipantRoleID	participant
recipCaseParticipantRoleID	relatedParticipant
startDate	fromDate
endDate	toDate
relationShipType	relationshipType

In the previous table, the `relationShipType` and `relationshipType` attributes are of data type code table. For Insurance Affordability, the `relationShipType` attribute maps to the `RelationshipType` code table. For person evidence, the `relationshipType` attribute maps to the `RelationshipTypeCode` code table. An administrator can map a relationship between the two evidence types by configuring attribute mappings between the code table values that represent the logically equivalent attributes in the `RelationshipType` code table and `RelationshipTypeCode` code table. For example, the following table shows how the code table values in each table that represent a parent relationship are mapped:

Table 4. Example to show member to person evidence relationship attribute mapping for a parent relationship

Member evidence code table value	Person evidence code table value
RT26301 Is Parent of	RT1 Parent

Relationship reciprocity

Reciprocal relationships are not created as part of the sharing process but are handled on the target case, if required, by using the standard evidence maintenance of a relationship on that case. The design of a relationship and the handling of reciprocal relationships on person evidence is different when compared to either Insurance Affordability cases, or Income Support cases. After relationship evidence is shared, each individual case handles its own specific maintenance of the evidence and preserves the relationships.

Sharing relationships to person evidence

Sharing relationships to person evidence requires an exception to the standard evidence sharing rule, which states that you can only share evidence that involves two case members if both people exist on the target case. To enable the exception, the system is informed which evidence types need to bypass the standard evidence sharing rule by updating the `RelationshipEvidenceTypes` code table. The code table entries are available directly within the product for sharing member relationship evidence from Insurance Affordability cases to person relationship evidence, and also for sharing household relationship evidence from Income Support cases to person relationship evidence.

Income evidence types

A sharing rules XML file is provided for mapping income evidence between Income Support cases and Insurance Affordability cases. Income evidence is stored in a different structure between an Income Support case and an Insurance Affordability case, where each case type uses different evidence types.

On Income Support cases, income evidence is stored in two evidence types, earned income evidence and paid employment evidence. On Insurance Affordability cases, income evidence is stored in the single income evidence type. The following tables show how the attributes are mapped for each evidence type in a logically equivalent evidence sharing configuration.

> **Note:**
> A `sourceLookUp` attribute is also required when you map a case participant source attribute that is of data type to a target attribute that is of string type and that contains a participant property, such as a name or a description. For example, when you map Income Support earned income evidence to Insurance Affordability income evidence, the `empCaseParticipantRoleID` attribute on the source earned income evidence contains only a code reference to the participant. However, on the target income evidence, the `employerName` attribute requires a descriptive employer name in string format, which is populated from the `sourceLookUp` attribute.

Table 5. Income Support earned income evidence to Insurance Affordability income evidence attribute mappings

Income Support earned income attributes	Insurance Affordability income attributes
seasonalIncomeInd	seasonalIncomeInd
earnedIncomeType	incomeType
amount	amount
frequencyCode	frequencyCode
startDate	startDate
endDate	endDate

Table 6. Income Support paid employment evidence to Insurance Affordability income evidence attribute mappings

Income Support paid employment attributes	Insurance Affordability income attributes
caseParticipantRoleID	caseParticipantRoleID
empCaseParticipantRoleID	employerName

> ✏️ **Note:**
> You must also specify a description in the `sourceLookUp` attribute.

The logically equivalent `earnedIncomeType` and `incomeType` attributes are of data type code table. The `earnedIncomeType` attribute references the `EarnedIncomeType` code table and the `incomeType` attribute references the `IncomeType` code table. Therefore, the income type attributes can be represented by code table values in a logically equivalent sharing rules XML file, as shown in the example in the following table:

Table 7. Income Support income type to Insurance Affordability income type code table value mapping

Income support earned income evidence code table value	Insurance Affordability income evidence code table value
ET74 Wages and Salaries	IT26001 Wages and Salaries

See the XML samples for more information about the code table values.

Evidence flow for income evidence types

If you share earned income evidence, which is a child of paid employment evidence, to the target income evidence, in the XML rules file, you must map both the parent paid employment evidence and the child earned income evidence. Because you want to share only the child earned income evidence, the actual mapping occurs only between the child earned income evidence and the target income evidence. However, to provide the evidence broker with enough information to share earned income evidence to income evidence, you must also include the parent paid employment evidence in the XML rules file and the child earned income evidence. In the previous parent-child evidence scenario, the case participant role ID attribute is only included in the paid employment evidence type. Without access to the case participant role ID attribute, the broker cannot identify who owns the shared evidence.

Because you are mapping evidence where more than a one to one relationship exists between the evidence types, you must define the relationship between the evidence types. When evidence is shared from an Income Support case to an Insurance Affordability case, the parent and child are entered in two `EvidenceMapping` elements in one XML configuration file. When evidence is shared from an Insurance Affordability case to an Income Support case, the parent and child mappings are defined in two separate XML configuration files.

Pregnancy evidence types

A sharing rules XML file is provided for mapping pregnancy evidence between Insurance Affordability cases and Income Support cases. For clients who are receiving assistance, the Insurance Affordability case records and the Income Support records are kept parallel for any pregnancy information.

For any further information about the pregnancy, you can record a due date and the resulting child evidence types are created on the target evidence. See the `Action` XML element and the child element `Create` to maintain evidence records for client pregnancy and any new records that are required for children of a client.

One evidence type provides a stand-alone record and the other evidence type creates several child records to reflect, in this scenario, the number of unborn children. The number of unborn children can be kept consistent between two cases.

The following table shows the attributes that each case evidence type contains:

Table 8. Insurance Affordability pregnancy evidence to Income Support pregnancy evidence attribute mappings

Insurance Affordability attributes	Income Support attributes
`caseParticipantRoleID`	`caseParticipantRoleID`
`dueDate`	`dueDate`
`startDate`	`startDate`
`pregnancyEndDate`	`endDate`

Creating new records based on pregnancy evidence

The structure of the Insurance Affordability pregnancy evidence type is stand-alone, and the structure of the Income Support pregnancy evidence type is hierarchical to represent any unborn children. The different structure requires a logically equivalent evidence mapping and actions to manage the creation of the differing structures. Therefore, child instances are created on the target evidence based on the number of unborn children. The XML `Action` element and `Create` child elements are used for this purpose.

Disability evidence types

A sharing rules XML file is provided for mapping disability evidence between Insurance Affordability cases and Income Support cases. When an Income Support case is created for a client or a disability status for a client is amended, any disability that is recorded for the client is copied across from the Insurance Affordability case.

To enable the broker to share disability information between the Insurance Affordability and Income Support disability evidence types, the participant and household member disability evidence attributes that are logically equivalent are mapped in a sharing rules XML file.

The `Disability Type` and `Competency Status` attributes contain disability types that are of data type code table. Therefore, in a sharing rules XML file, each attribute can be represented by a code table value that represents the disability or competency status type.

Through a logically equivalent sharing configuration, the broker can detect a change on a case and present information to a caseworker on an incoming evidence list for manual intervention. Therefore, for example, the caseworker can review any additional information on the case. In the sample sharing rules XML file, see the `Action` element and the `Display` child element to specify a field change that is linked to manual intervention. The following table shows how the attributes are mapped between each case evidence type:

Table 9. Insurance Affordability disability to Income Support disability evidence attribute mappings

Insurance Affordability disability attributes	Income Support disability attributes
caseParticipantRoleID	caseParticipantRoleID
disabilityType	disabilityType
competencyStatus	competencyStatus
dateCompetencyDetermined	dateCompetencyDetermined
disabilityStartDate	disabilityStartDate
disabilityEndDate	disabilityEndDate

Display any additional information in relation to disability evidence

If you share disability information between Income Support and Insurance Affordability cases, different evidence types are used for each case type. Not all attributes are present on both evidence types. Therefore, some fields that might be populated with important information are not mapped. For example, use the XML `Display` element to ensure that if the `disabilityType` is changed and any unmapped attributes are populated, the broker displays the evidence on the target case's incoming list. Therefore, a change to the `disabilityType`, along with the presence of unmapped information, can prevent the data from being shared seamlessly accurately, and require manual intervention by the caseworker.

Student evidence types

A sharing rules XML file is provided for mapping student evidence between Insurance Affordability cases and Income Support cases. You can link any school or educational evidence record for a case or client when you share evidence from an Insurance Affordability case to an Income Support case.

Student information can be added for a case or client that changes a school or a place of study. When a participant changes, the information is presented to a caseworker on an incoming evidence list for manual intervention. The student evidence type is configured to be shared when details are changed for the associated case student evidence types. In the sharing rules XML file, see the `Action` element and the `Display` child element for information about how to specify that an update to an attribute value requires the student evidence to be displayed in the caseworker's incoming evidence list.

Student evidence type attribute mappings are similar to disability attribute mappings in that only the participant and household member attributes are different between an Insurance Affordability case and an Income Support case. The following table shows how the attributes are mapped between each case evidence type:

Table 10. Insurance Affordability student to Income Support student evidence attribute mappings

Insurance Affordability disability attributes	Income Support disability attributes
`caseParticipantRoleID`	`caseParticipantRoleID`
`studentStatus`	`studentStatus`
`schoolType`	`schoolType`
`school`	`school`
`studentStartDate`	`studentStartDate`
`studentEndDate`	`studentEndDate`

The logically equivalent `studentStatus` attributes are of data type code table, where both attributes reference the same `StudentStatus` code table. Therefore, the `studentStatus` attributes can be represented by a one to one mapping of every code table value from the code table in a logically equivalent sharing rules XML file.

The logically equivalent `schoolType` attributes are also of data type code table, where both attributes reference the same `SchoolType` code table. Therefore, the `schoolType` attributes can be represented by a one to one mapping of every code table value from the code table in a logically equivalent sharing rules XML file.

Benefits evidence types

A sharing rules XML file is provided for mapping benefits evidence between Insurance Affordability cases and Income Support cases. The set of attributes for the benefits evidence type is identical. However, the values for `Benefit Type` and `State` are referenced through code table values in the sharing rules XML file.

Because you are sharing from an Insurance Affordability to an Income Support case, only selected benefit types are available on each case. Also, the complete range of attributes differs between each benefits evidence type on the source and target cases.

In the logically equivalent evidence sharing rules XML file, the code table values for selected benefit types are tailored for the benefits that are required on the cases. The following table shows how the attributes are mapped between each case evidence type:

Table 11. Benefits evidence attribute mappings

Insurance Affordability ben-efits evidence attributes	Income Support benefits evidence attributes
`caseParticipantRoleID`	`caseParticipantRoleID`
`state`	`state`
`benefitType`	`benefitType`
`startDate`	`startDate`
`endDate`	`endDate`

The logically equivalent `benefitType` attributes are of data type code table. The Insurance Affordability `benefitType` attribute references the `HCBenefitType` code table and the Income Support `benefitType` attribute references the `BenefitType` code table. Therefore, the `benefitType` attributes can be represented by mapping every code table value from the code tables in a logically equivalent sharing rules XML file.

The logically equivalent `state` attributes are of data type code table. The Insurance Affordability `state` attribute references the `AddressState` code table and the Income Support `state` attribute references the `StateCodes` code table. Therefore, the `state` attributes can be represented by mapping every code table value from the code tables in a logically equivalent sharing rules XML file.

A benefits evidence type flow

Income Support benefits evidence is only shared to Insurance Affordability benefits, when the source evidence attribute has a value of either `Medical Assistance`, `Medicare Part A`, `Medicare Part B`, or `State Supplementary Payment`. Although another value might be selected, the sharing rules XML uses a `ShareWhen` instruction to check the `benefitType` and apply the restriction. Therefore, when a client on an Income Support case applies for a benefit that is one of the four previous types, the data is inserted onto any qualifying target Insurance Affordability case as the target evidence type. Further validation of the source evidence might be required by using the XML `Display` element.

Medicaid eligibility evidence types

A sharing rules XML file is provided for mapping Medicaid eligibility evidence between Insurance Affordability cases and Income Support cases in a logically equivalent evidence sharing configuration. The Medicaid eligibility types are defined through code table values in a code table.

For Medicaid eligibility evidence on both Insurance Affordability cases and Income Support cases, the logically equivalent `coverageType` attributes are of data type code table, where both attributes reference

the same `ProductName` code table. Therefore, the `coverageType` attributes can be represented by a one to one mapping of every code table value from the code table in a logically equivalent sharing rules XML file. It is possible to select a subset of attributes and specific products between cases by using a subset of code table values.

The following table shows how the attributes are mapped between each case evidence type. For information about how the `coverageType` code table values are mapped, see the sample XML file.

Table 12. Medicaid eligibility evidence attribute mappings

Insurance Affordability Medicaid eligibility evidence attributes	Income Support Medicaid eligibility evidence attributes
caseParticipantRoleID	caseParticipantRoleID
coverageType	coverageType
startDate	startDate
endDate	endDate

> **Note:**
> This mapping was removed in v8.

Appendix A: Changes that are introduced in the sample XML refresh for v7.0.11

Previous enhancements to the evidence broker included a number of sample XML configurations. The configurations are intended to assist customers in configuring evidence sharing between Income Support and Insurance Affordability cases. In v7.0.11 of Social Program Management, the sample XML configurations are refreshed.

Sample XML configurations

The following list outlines the sample XML configurations that were initially provided.

Income Support to Insurance Affordability specific mappings

- CGISSBenefits_HCRBenefits.xml
- CGISSDisability_HCRDisability.xml
- CGISSEarnedIncome_HCRIncome.xml
- CGISSHouseholdMember_HCRSSN.xml
- CGISSPregnancy_HCRPregnancy.xml

- CGISSRelationships_HCRRelationships.xml
- CGISSRelationships_PDCRelationships.xml
- CGISSStudent_HCRStudent.xml

Insurance Affordability to Income Support specific mappings

- HCRBenefits_CGISSBenefits.xml
- HCRDisability_CGISSDisability.xml
- HCRIncome_CGISSEarnedIncome.xml
- HCRIncome_CGISSPaidEmployment.xml
- HCRMedicaidEligibility_ISMedicaidEligibility.xml
- HCRPregnancy_CGISSPregnancy.xml
- HCRRelationships_CGISSRelationships.xml
- HCRRelationships_PDCRelationships.xml
- HCRSSN_CGISSHouseholdMember.xml
- HCRSSN_PDCIdentifications.xml
- HCRStudent_CGISSStudent.xml

Participant Data Case to Insurance Affordability specific mappings

- PDCIdentifications_HCRSSN.xml
- PDCRelationships_HCRRelationships.xml

Participant Data Case to Income Support specific mapping

- PDCRelationships_CGISSRelationships.xml

Income Support specific mapping for Medicaid Eligibility

- IS_Medicaid_Eligibility_Non_MAGI_Medicaid_Eligibility.xml

Updated XML configurations

The refreshed sample XML configurations strengthen the rules for sharing evidence to promote seamless sharing when Trusted Source is set to **Yes**. The following list outlines the types of changes that are applied to the refreshed sample XML configurations:

- Updates to address incomplete mappings.
- Updates to the business logic for how mappings work.
- Updates that are consistent with the XML parsing capabilities that are provided in v7.0.11 of Social Program Management.

Incomplete mappings

Two sharing XML configuration files are updated to address incomplete mappings.

Missing mappings

The CGISSStudent_HCRStudent.xml XML configuration file was missing a mapping from the `schCaseParticipantRoleID` attribute on the source to the `school` attribute on the target.

Missing `ShareWhen` rule

A `ShareWhen` rule was missing from the XML configuration file CGISSHouseholdMember_HCRSSN.xml to prevent the sharing of household member evidence to SSN Details where **N/A** was specified as the `SSN Status`.

Updates to the business logic for how mappings work

Various sharing XML configuration files are updated to enhance how the configurations work.

In the original version of the HCRStudent_CGISSStudent.xml configuration, a `Set` action was provided that defaulted the Highest Grade Completed on the target student evidence to First Grade. The intention was to promote seamless sharing. However, the default is removed to lessen the risk of sharing an incorrect value. When student evidence is shared now, it always appears in the incoming evidence list from where a user can specify the correct value.

A `ShareWhen` rule is added to the HCRPregnancy_CGISSPregnancy.xml configuration to share only when the due date is specified on the pregnancy evidence on Health Care Reform (HCR). The rationale for the change is that if no due date is specified, no unborn child information is available to form mandatory pregnancy evidence in the target case. As a result, the user cannot process the incoming evidence because of a validation, 'Pregnancy - Unborn Child evidence must be recorded for the Pregnancy evidence record for XXX', that is displayed when the evidence is activated.

A `ShareWhen` rule is added to the CGISSEarnedIncome_HCRIncome.xml configuration to share only when the income type is `Wages & Salaries`.

The configuration HCRIncome_PaidEmployment.xml and the configuration HCRIncome_CGISSEarnedIncome.xml are updated to share only when the employer name is specified. With further updates to these mappings that are consistent with enhancements developed as part of v7.0.11, the change is intended to promote the seamless sharing of HCR income to paid employment and earned income on Income Support.

Updates that are consistent with the new XML parsing capabilities

In v7.0.11, two new capabilities in the logically equivalent XML are introduced.

Set action type of `SOURCECASELOOKUP`

When evidence is shared from a source to a target, sometimes not all values that must be populated on the target are available on the source. If some of the values that cannot be populated on the target are mandatory, it results in the evidence always appearing on the incoming evidence list page. As a result, a caseworker must manage the evidence on the incoming evidence list page.

The `SOURCECASELOOKUP` mechanism facilitates the retrieval of target evidence values from evidence entities on the source case. The sharing XML file HCRSSN_CGISSHouseholdMember.xml is a good example of a sharing configuration where not all target values on the household member evidence are available on the SSN Details source evidence.

This sharing XML file is updated and the `SOURCECASELOOKUP` mechanism is now used to populate three mandatory values on the household member evidence. The following snippet of XML shows the new `Set` action:

```
<Action>

  <Set type="ET10066">

    <Parameter name="citizenStatus" type="SOURCECASELOOKUP" value="DET0026032"

      srcAttr="citizenStatusCode" tableName="AlienStatus">

      <ParamMapping source="HCCS26001" target="AS1"/>

      <ParamMapping source="HCCS26002" target="AS4"/>

      <ParamMapping source="HCCS26004" target="AS7"/>

    </Parameter>
```

```
    <Parameter name="veteranStatus" type="SOURCECASELOOKUP" value="DET0026068"

     srcAttr="militaryStatusCode" tableName="VeteranStatus">

     <ParamMapping source="MS1" target="VS1"/>

     <ParamMapping source="MS2" target="VS8"/>

     <ParamMapping source="MS3" target="VS8"/>

     <ParamMapping source="MS26003" target="VS6"/>

     <ParamMapping source="MS26001" target="VS19"/>

     <ParamMapping source="" target="VS6"/>

    </Parameter>

    <Parameter name="whiteOrCaucInd" type="SOURCECASELOOKUP" value="DET0026050"

     srcAttr="whiteOrCaucInd"/>

    <Parameter name="blkOrAfrAmerInd" type="SOURCECASELOOKUP" value="DET0026050"

     srcAttr="blkOrAfrAmerInd"/>

    <Parameter name="asianInd" type="SOURCECASELOOKUP" value="DET0026050"

     srcAttr="asianInd"/>

    <Parameter name="natAlaskOrAmerInd" type="SOURCECASELOOKUP" value="DET0026050"

     srcAttr="natAlaskOrAmerInd"/>

    <Parameter name="natHawOrPaIsInd" type="SOURCECASELOOKUP" value="DET0026050"

     srcAttr="natHawOrPaIsInd"/>

   </Set>

 </Action>
```

To an extent, the `ParamMapping` acts as a filter because it permits only certain values to be mapped. The following table summarizes what occurs.

Source attribute	The source case entity that is looked up	Permitted values (ParamMapping)
citizenStatusCode	Citizen Status (DET0026032)	• Alien Lawfully Present > Alien • US Citizen > US Citizen • US National > US Non-Citizen National

Source attribute	The source case entity that is looked up	Permitted values (ParamMapping)
militaryStatusCode	Military Status (DET0026068)	• Active Duty > Active Duty • Dependent Child > Spouse/Child of Active Duty • Dependent Spouse > Spouse/Child of Active Duty • No Service > No Service • Active Duty/Honorably discharged > Veteran Honorably Discharged • "" > No Service* *A blank value means that no value can be retrieved on the source case, so in this instance the Veteran Status on the Household Member evidence defaults to No Service.
whiteOrCaucInd	Demographics (DET0026050)	
blkOrAfrAmerInd	Demographics	
asianInd	Demographics	
natAlaskOrAmerInd	Demographics	
natHawOrPaIsInd	Demographics	

`sourceLookUp` **of employment**

One of the most important mappings is HCR income to paid employment and earned income, as income is captured so frequently and always affects eligibility and entitlement. Before v7.0.11, when paid employment and earned income evidence appeared on the incoming evidence list page, three key pieces of mandatory data were always missing from the paid employment evidence. The following list outlines the three pieces of mandatory data that were always missing from the paid employment evidence:

- employmentID
- empCaseParticipantRoleID
- employmentType

To populate the mandatory data, the caseworker had to select the correct employment for the client before the evidence could be added to the target case. A feature in v7.0.11 aims to promote the seamless sharing of HCR income to paid employment and earned income.

The evidence broker contains a `sourceLookUp` of `name` that facilitated the looking up of the employer's name from the employer case participant role when earned income was shared to income in the `CGISSEarnedIncome_HCRIncome.xml` mapping. The following snippet lists the XML to achieve this:

```
<EvidenceMapping source="ET10097" target="DET0026030">

  <Mapping source="caseParticipantRoleID" target="caseParticipantRoleID"/>

  <Mapping source="empCaseParticipantRoleID" sourceLookUp="name" target="employerName"/>

  <Action/>

</EvidenceMapping>
```

This `sourceLookUp` feature is extended to facilitate the looking up of the three pieces of mandatory data for paid employment evidence. The following XML outlines the updated `HCRIncome_CGISSPaidEmployment.xml` configuration:

```
<XML>

  <EvidenceMapping source="DET0026030" target="ET10097">

    <Mapping source="caseParticipantRoleID" target="caseParticipantRoleID"/>

    <Mapping source="employerName" target="empCaseParticipantRoleID"

      sourceLookUp="employment"/>
```

```
    <Mapping source="employerName" target="employmentID" sourceLookUp="employment"/>

    <Mapping source="employerName" target="employmentType" sourceLookUp="employment"/>

    <Action>

      <Set type="ET10097">

        <Parameter name="employmentType" type="SOURCECASELOOKUP" value="DET0026030"

          srcAttr="seasonalIncomeInd" tableName="PaidEmploymentType">

          <ParamMapping source="true" target="PE2"/>

        </Parameter>

      </Set>

    </Action>

    <ShareWhen>

      <AND>

        <Rule>"DET0026030.employerName" != ""</Rule>

        <Rule>"DET0026030.incomeType" == "IT26001"</Rule>

      </AND>

    </ShareWhen>

  </EvidenceMapping>

</XML>
```

Along with the feature, a paid employment interface, `curam.aes.sl.delivery.processor.impl.PaidEmployment`, is introduced in v7.0.11. The interface is called for each of the mappings where `sourceLookUp="employment"`. A default implementation of the interface is provided, but customers can provide their own implementation. The following list outlines how the default implementation works:

- The default implementation uses `Soundex` to match the employer name against the list of employments that are associated with a client. Where a match is found, then the details of the employment are used to populate `employmentID`. The employer who is providing the employment is registered as a case participant role of type `Employer` on the target case and the case participant role identifier is returned as the `empCaseParticipantRoleID`. Finally, the employment type is derived from the number of working hours that are associated with the employment. If the number of hours that are worked per week is 32 or more, then the system deems the employment type `Full-time`. Otherwise, the system deems the employment type `Part-time`.

- The employment type can also be `Seasonal`. In the preceding XML, the `SOURCECASELOOKUP` feature is used to determine the value of the `seasonalIncomeInd` flag on the HCR income evidence. Where the flag is set to `true`, the employment type on the paid employment evidence is set to `Seasonal`. This overrides any value that is set for the `employmentType` attribute by using the preceding `sourceLookUp` mechanism.

Appendix B: Changes that are introduced in the sample XML refresh for v8

In v8 of Merative™ Social Program Management, two sharing configurations have been removed. The evidence based approach for cascading eligibility has been replaced with a case groups-based approach. This is covered in the What's New section of the Knowledge Center so that customers can see what has been removed/changed and can learn more about the new mechanism for sharing eligibility. The Insurance Affordability to Income Support specific mappings have been removed as this is something that should not have been shipped originally.

Sample XML configurations

The following list outlines the sample XML configurations that were removed in v8.

Insurance Affordability to Income Support specific mappings

- HCRMedicaidEligibility_ISMedicaidEligibility.xml

Income Support specific mapping for Medicaid Eligibility

- IS_Medicaid_Eligibility_Non_MAGI_Medicaid_Eligibility.xml

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