



CÚRAM FOR ELIGIBILITY

Cúram for Eligibility delivers a modern, comprehensive and componentized solution for social enterprises, supporting a “No Wrong Door” approach for clients and an outcome-focused approach to the enterprise.

A top priority for social enterprises worldwide is the long term wellbeing and self-sufficiency of the individuals and families they serve; a goal often made more difficult by aging legacy systems which are difficult to use, and costly to maintain and modify. Cúram for Eligibility delivers a modern, comprehensive and componentized solution for social enterprises, supporting a “No Wrong Door” approach for clients and an outcome-focused approach to the enterprise.

“NO WRONG DOOR” APPROACH FOR INTAKE & ENROLLMENT

Cúram for Eligibility is designed to directly support clients in easily finding the help they need and enables caseworkers to better support their clients in achieving their potential. Cúram for Eligibility supports a “No Wrong Door,” program agnostic approach to supporting clients. Clients are guided through a simple set of questions which identifies their needs and concerns (e.g. “Do they have enough food to feed themselves and their family?”, “Are they facing eviction?”) Based on the answers provided, referrals to community organizations are provided,

the eligibility enrollment process is initiated and the required level of client support is targeted.

Needs Based Triage

Often clients are scared and confused by the complexity surrounding the process of finding and applying for help and caseworkers are challenged to keep up with vast list of community providers who offer services that complement government programs. Needs Based Triage helps eliminate this complexity and facilitates a tiered response to needs by leveraging community resources along with government programs. This process, available to both citizens and caseworkers, guides the user through a simple set of questions to ascertain a client’s challenge around basic needs such as food, health, safety and shelter (e.g. “Do you have enough food to feed yourself and your family?”, “Are you facing eviction?”). Based on the answers provided, a list of community providers and government programs most closely aligned with the client’s needs is generated. Through integration with Google Maps™, clients are directed to community providers that not only meet their needs, but are in

close proximity. Needs Based Triage also generates a list of government programs for which clients can be screened for potential eligibility or apply for assistance.

Life Event Management

Cúram Life Events Management™ goes beyond simple change-in-circumstance processing. Cúram not only captures that a change has occurred, but analyzes the impact of various change types (e.g. got divorced, reporting a change of income, had a baby). It uses the information to direct clients to appropriate community services and government programs providing a multi-tiered, coordinated response to the life event. The information captured through Life Event Management can be transferred to a Cúram benefit case or analyzed and broadcast to relevant back-end systems.

Differential Response using Priority, Complexity and Risk (PCR)

For most social enterprises, 20% of clients consume 80% of their resources. Identifying those clients who require more agency support allows organizations to develop differential responses to their client base, targeting their limited resources to complex cases and streamlining the process for the rest. Organizations need a way to quickly identify clients with urgent (priority) needs, or those potentially at risk, in an effort to quickly focus agency resources at those most in need. Cúram's configurable PCR capabilities identify clients with emergency needs, families with complex family structures and citizens at risk, empowering caseworkers and organizations to respond appropriately. Clients using self-service will be notified if their response to a question (e.g. Answering "yes" to the triage question, "Is there anything going on in your life that makes you feel afraid or unsafe?") indicates they should take immediate action (e.g. Find the closest women's shelter). Caseworkers are alerted when the PCR rating passes a configurable threshold for a client and are presented with a set of suggestions and recommended actions. In addition to point-in-time

alerts, organizations can track PCR for a client over time for ongoing client/case management.

SUBJECT MATTER EXPERTISE FOR SOCIAL ENTERPRISE CASE MANAGEMENT

The subject matter experts at Cúram Software have ensured that Cúram for Eligibility is a content-rich, innovative solution built around industry best practice business processes. Many have worked as caseworkers or social workers and understand the need for client centric applications that give a holistic view of clients and their families. This deep domain knowledge is built into the solution and is evident in every aspect of the offering such as evidence management, provider management and pre-packaged content. Cúram recognizes aligning the complete life cycle of an eligibility program with out-of-the-box software leads to a faster implementation, lower risk and better return on investment. After analyzing common eligibility business processes around the globe, Cúram Software packaged the processes, workflows, rules and assessments into key business flows to ensure that the Cúram for Eligibility solution meets core requirements on day one.

Role-based User Interface

The Cúram solution provides a customizable, intuitive, web-based user interface. Role-based home pages feature customizable pods with real time data to help workers manage their workload more effectively. Additional features include tabbed navigation, mouse-over detail windows, collapsible shortcut and action panels and an RSS feed that allows organizations to keep users informed of important announcements.

Embedded Analytics

Cúram provides embedded analytics, powered by BIRT, to help caseworkers manage their work. Role specific home pages and dashboards display graphical representations of real-time data to users enabling them to manage their workload more effectively. Some of the embedded analytics include:

Cúram for Eligibility provides an intuitive, guided evidence capture allowing workers to manage all aspects of evidence management, including verification, from a single point of access.

- Assigned Applications (Intake Worker, Eligibility Worker)
- Online Applications Work Queue (Intake Worker, Supervisor)
- Applications Awaiting Determination Work Queue (Eligibility Worker, Supervisor)
- Applications Awaiting Disposition (Eligibility Worker, Supervisor)
- My Team Applications (Supervisor)
- My Team Applications Awaiting Disposition (Supervisor)

Guided Evidence Capture

Cúram for Eligibility provides an intuitive, guided evidence capture allowing workers to manage all aspects of evidence management, including verification, from a single point of access. Workers can also freely move through evidence categories and types as necessary. Evidence is captured once for all relevant programs and can be sent to one or more Cúram systems or to existing legacy systems. Configurable rule sets alert workers to issues with evidence (missing or incomplete evidence) and required verifications. Tips and reminders are provided for less experienced workers and can be turned on or off by an administrator.

Advice/Advisor

As the number of experienced caseworkers decline, organizations are looking for ways to support and educate less experienced workers, minimizing the impact of the on-boarding process. Cúram Advisor is a configurable tool that provides on-screen support to less experienced workers. Advisor can be configured to prompt users as to the next step in a process; display issues, tips and reminders during guided evidence capture and is the mechanism for displaying PCR ratings along with suggestions and recommended actions.

Pre-packaged Content

The subject matter experts at Cúram have developed out-of-the-box industry content spanning the entire end-to-end business process, from triage to outcome

management. Some of the optional industry content includes:

- **Triage**
Triage assessments which are integrated to the community services 211 taxonomy ensure that community providers are properly categorized and easy to find
- **Multi-Program Screening**
Screening scripts and rules determine potential eligibility for over 25 government programs
- **Online Applications**
Online applications for Food, Cash, Medical Assistance and Child Care
- **PCR**
PCR rules and notification text
- **Advice**
Advice rules and text for Food, Cash and Medical Assistance programs
- **Eligibility and Entitlement Rules**
Full eligibility and entitlement rule sets for Food, Cash, Medical Assistance and Child Care programs including rules for sanctions and work participation.
- **Evidence Entities**
Over 1000 evidence entities to support eligibility determination and outcome management
- **Self-Sufficiency Assessments and Outcome Plans**
Self-sufficiency assessments integrated to outcome plans designed to move clients toward sustainable work and self-sufficiency.
- **Embedded Analytics and KPIs**
Embedded analytics and KPIs for Food, Cash, Medical Assistance and Child Care programs

OUTCOME FOCUSED SERVICE DELIVERY

Since their inception, eligibility systems have focused on automation to ensure efficient processing of cases. While this approach has provided greater accountability and efficiency, it has failed to serve case workers in crafting the most effective plan of action for their clients. The Cúram solution enhances the eligibility process through an outcome focused offering. Cúram for Return to Work Outcome

Management offering provides caseworkers and their clients with the information they need to quickly analyze the challenges facing the client. Once identified, workers are able to develop a comprehensive plan incorporating all stakeholders such as family, providers, counselors and caseworkers. At every stage of the process, Cúram has embedded technologies to deliver caseworkers an eligibility case management system that enables them to get their job done effectively and guide their clients towards successful and sustainable outcomes.

Self-Sufficiency Assessments

The best way to serve clients is to help them move towards sustainable employment with the ultimate goal of self-sufficiency. Cúram for Return to Work Outcome Management is designed to help caseworkers and employment workers identify clients' strengths, needs and barriers (SNB) to employment so that they can build a self-sufficiency outcome plan that meets each client's specific needs. Self-sufficiency assessments identify SNB on nine factors (Education, Employment, Child Care, Housing, Transportation, Mental Health, Physical Health, Substance Abuse and Domestic Violence).

Return to Work Outcome Planning

Based on the assessment result the system recommends plan items (services, actions and referrals). Cúram for Return to Work Outcome Management is integrated with Cúram Provider Management™ allowing workers to perform service provisioning from within the outcome plan. A critical connection missing from most eligibility systems is the link between client needs, goals, services and outcomes. Cúram's outcome management has an integrated assessment and planning framework that provides all case participants clear insights into the goals for the client or family, services that are being administered and targeted outcomes. The outcome workspace gives the caseworker a graphical visualization of the clients' needs, plan and progress. Assessments are performed on a periodic basis and,

as the client's SNB changes, so does their plan. For U.S. based organizations administering SNAP and TANF programs, program specific content ensures plan activities maximize federal requirements for program participation in work activities.

Work Participation & Tracking

Most organizations handling eligibility programs are looking to be proactive in helping their clients return to work and become self-sufficient. To support this goal, Cúram for Eligibility provides a work requirement wizard that helps workers identify clients that may be required to participate in work related activities as a condition of benefit eligibility. The solution has an activity planner that recommends the most logical and optimal suite of plan items to move the client toward self-sufficiency and maximize any mandated work participation rates. Participation & attendance management functionality provides organizations with a mechanism to track clients participation and attendance via roster or manual updates. Workers and supervisors manage clients' plans and participation with real-time metrics delivered through Participation reports and dashboards.

NEXT GENERATION COTS FOR SEM

Cúram for Eligibility was designed to address the needs of the Eligibility market with the domain-specific functionality espoused by transfer offerings, but without the inherent implementation and maintenance drawbacks of transfer or custom systems. Eligibility systems are long-term investments with technology standards evolving during the lifecycle of a system. Cúram tracks the trends and incorporates technology and standards relevant to eligibility and the broader social enterprise industry in the architecture and delivers access to emerging trends to the customer via regular upgrades. Through this continual investment process, Cúram Software customer implementations stay current and relevant in the rapidly changing technology landscape. Using its commercial off-the-shelf (COTS) capabilities, Cúram offers an eligibility

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solution that is both componentized and highly configurable.

Flexible IT Strategy and Architecture

The Cúram solution is comprised of several components like Cúram Citizen Self Service™, Cúram Common Intake™ and Cúram for Return to Work Outcome Management. Each of these components can be implemented as a 'stand alone' modern front-end to existing legacy systems or as a component of a larger Cúram solution. The flexible design lowers initial risk and leverages existing assets while still providing a roadmap for future modernization. Organizations use Cúram's extensive domain specific content (e.g. screening rules, eligibility rules and business processes) or their own rules, giving organizations the ability to modernize and streamline their business processes without the disruption of full and immediate legacy replacement.

End-to-End Configuration

Cúram is designed so nearly every aspect of the end-to-end process can be configured, allowing organizations to add, remove, and modify functionality without costly and time-consuming coding.

- **Cúram Dynamic Solutions™** provides the means for organizations to add programs (including evidence entities, business rules, screens, etc) using a wizard.
- **Cúram's Script Editor** allows organizations to modify Cúram's Triage, Screening, Application and Assessment scripts or create their own
- **The Cúram Express Rules Editor** allows business analysts and technical staff to collaborate on rules using natural language and visual diagrams. It can be used to modify Cúram's extensive set of triage, screening, eligibility and assessment rules or to create new rules.
- **Cúram Administration Suite™** provides the means to modify and/or create workflow, decision tables, rate tables, outcome plan items and templates, users, user roles, etc.

SOA Based

Cúram's solutions are constructed using a service-oriented approach based on open standards such as XML and J2EE to promote technology re-use and lower cost of maintenance and to ensure deployment flexibility, scalability, business agility and ready integration with other systems across the enterprise. The payoffs are compelling, including reducing the cost and complexity of integration, leveraging existing IT assets and a renewed focus on business processes rather than the technology on which those processes are delivered.

Investing in Cúram delivers the organization the program depth it needs to be successful, built on an extensible architecture that will meet the needs of the entire social enterprise. As a COTS product, organizations are able to reduce cost of implementation and maintenance, while taking advantage of regular upgrades to ensure currency. Only Cúram Software delivers organizations the combination of program and product development expertise.

FOR MORE INFORMATION, PLEASE VISIT WWW.CURAMSOFTWARE.COM