



IBM Cúram Social Program Management

# Cúram Priority, Complexity, Risk Configuration Guide

Version 6.0.4

**Note**

Before using this information and the product it supports, read the information in Notices at the back of this guide.

This edition applies to version 6.0.4 of IBM Cúram Social Program Management and all subsequent releases and modifications unless otherwise indicated in new editions.

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# Table of Contents

Chapter 1 Introduction .....	1
1.1 Purpose .....	1
1.2 Audience .....	1
1.3 Selected Reading .....	1
1.4 Chapters in this Guide .....	2
Chapter 2 Creating a PCR Configuration .....	3
2.1 Introduction .....	3
2.2 Basic Configuration Details .....	3
2.3 Selecting a PCR Rule Set .....	4
2.4 Associating a PCR Configuration with a Case .....	4
2.5 Deferred Processing .....	4
2.6 Running a PCR Assessment .....	4
2.7 Manually Entering a PCR Assessment .....	4
2.8 Automatically Running a PCR Assessment .....	5
2.9 PCR Configuration Lifecycle .....	5
Chapter 3 Configuring PCR Range Mappings .....	6
3.1 Introduction .....	6
3.2 Range Mapping Settings .....	6
Chapter 4 Creating a PCR Rule Set .....	8
4.1 Introduction .....	8
4.2 Creating a PCR Rule Set .....	8
4.3 Mandatory Rule Attributes .....	8
4.4 Specifying Rule Set Properties Text .....	10
Notices .....	11



# Chapter 1

## Introduction

### 1.1 Purpose

The purpose of this guide is to describe the configuration options available for Priority, Complexity, Risk (PCR) processing. PCR processing allows the worker to calculate the priority, complexity and risk ratings for a case. PCR ratings can be triggered to be calculated automatically or entered manually by a case worker. Automatic PCR ratings are calculated using rule sets which are recorded by administrators for each PCR configuration. PCR must be configured before it can be used to determine the PCR rating for a case.

### 1.2 Audience

This guide is intended for administrators responsible for configuring the PCR component. It is assumed that the administrators have worked with code tables as part of Cúram system administration.

For PCR rule set configuration, previous knowledge of Cúram Express Rules is required.

### 1.3 Selected Reading

Document Name	Description
Cúram Common Intake Guide	This document provides a detailed overview of Cúram Common Intake functionality including PCR.
Working with Cúram Express Rules	This provides step by step instructions on how to create Cúram Express Rule sets and how to use the Cúram Express Rules Editor to add

Document Name	Description
	business and technical logic to a rule set.
Cúram Express Rules Reference Manual	This provides detailed information on the Cúram Express Rules language, development environment and run-time features.

Table 1.1 Selected Reading

## 1.4 Chapters in this Guide

The following chapters are included in this guide:

### **Creating a PCR Configuration**

This chapter describes how PCR is configured.

### **Configuring PCR Range Mappings**

This chapter describes how to configure PCR range mappings.

### **Creating a PCR Rule Set**

This chapter describes how to create a PCR rule set.

# Chapter 2

## Creating a PCR Configuration

### 2.1 Introduction

This chapter provides information on the different settings available when creating a PCR configuration. The following areas of PCR configuration are covered:

- Basic PCR configuration details
- PCR Rule Set Selection
- Associating a PCR configuration with a case
- Deferred processing
- Running a PCR assessment
- Manually entering a PCR assessment

### 2.2 Basic Configuration Details

Item	Description
Name	Mandatory text field. Individual PCR configurations can share the same name. For example, a PCR configuration called MyCaseConfiguration has a date range of January 1st - March 1st. A second configuration with the same name starting on March 2nd for the same case is also possible, because you may not want to rename the configuration.
Start Date	Mandatory field. Date when the PCR

Item	Description
	configuration starts.
End Date	Not Mandatory. Date when the PCR configuration ends. If no end date is specified the PCR configuration is considered to apply indefinitely from the start date.

Table 2.1 Basic Configuration Details for PCR

## 2.3 Selecting a PCR Rule Set

A PCR rule set which is used to calculate the PCR ratings for the case can be selected for a PCR configuration. This PCR rule set must be valid. For more information, see Chapter 4, *Creating a PCR Rule Set*.

## 2.4 Associating a PCR Configuration with a Case

PCR configurations must be associated with a case type. The case type can be selected from the dropdown list.

## 2.5 Deferred Processing

PCR calculation can be deferred to off peak times ensuring that PCR calculations do not cut into performance overhead. Selecting the Deferred Processing checkbox will calculate the PCR rating in deferred processing mode. Note that this setting is also not directly used in PCR processing OOTB.

## 2.6 Running a PCR Assessment

The 'Assess PCR' option, when configured, allows the case worker to manually run a PCR assessment. This results in the execution of the PCR rules which calculate the rating.

## 2.7 Manually Entering a PCR Assessment

Case workers can manually enter a PCR assessment without the use of a rule set. The 'Enter PCR' option is displayed when the organization has configured to allow the user to manually enter the PCR classification for the case. The functionality is enabled via a checkbox during PCR configuration. Once configured, the caseworker will see a button on the PCR tab which brings them to a modal page where they can enter a manual PCR assessment. For more information, see the *Cúram Common Intake Guide*.

## 2.8 Automatically Running a PCR Assessment

PCR run points determine when the PCR rules are executed for the automatic determination of PCR ratings. A PCR run point is a point at which the PCR rule set can be triggered to run and calculate the PCR rating for a case. Most of these points require a particular event to be raised in order to trigger the PCR assessment. For example, a point called 'Application Submitted' is available which can be used to allow a case worker to automatically assess PCR when an application is submitted. When the application is submitted, the run point is verified, and the PCR assessment is run.

The sample run points provided for automatic PCR calculation are as follows:

- Evidence Applied
- Add Program Application
- Confirm Withdraw Program Application
- Check Eligibility
- Application Submitted
- Remove Applicant
- Add Registered Client



### Note

An event is not raised when a manual PCR assessment is entered.

## 2.9 PCR Configuration Lifecycle

When a PCR configuration is first created it has a status of unpublished. An unpublished PCR configuration cannot be used in calculating PCR.

PCR configurations can be used for PCR calculations once they are published. It is not possible to publish a PCR configuration if there is another PCR configuration for the same case type with overlapping dates. Range mappings must be defined before publishing a PCR configuration. Modifying a published PCR configuration will return the configuration to unpublished.

# Chapter 3

## Configuring PCR Range Mappings

### 3.1 Introduction

This chapter provides information on the different settings available when creating a PCR range mapping. Range mappings must be defined for each of the PCR ratings. Range mappings provide a textual classification for ranges of numbers for each rating. For example, a priority range mapping could be defined from 0 – 50 with a classification of 'low'. If the rule set calculates a priority rating of 20 this is displayed to the user as a low priority.

### 3.2 Range Mapping Settings

Type	Description
Type	Mandatory field. The PCR range mapping type is a dropdown list containing priority, complexity and risk entries. This dropdown list is based on the PCRType codetable.
Classification	Mandatory field. The PCR classification is a dropdown for selecting the text to associate with the range. The dropdown is based on the PCRclassification codetable.
Range Start	Mandatory field. The range start is the value from which this range comes into effect.
Range End	Range end is the last value at which this range applies. If the range end is blank then the range applies indefinitely from the range start date.

Type	Description
	Ranges cannot overlap within a type and each classification can only be defined once per type.

Table 3.1 PCR Range Mapping Settings

# Chapter 4

## Creating a PCR Rule Set

### 4.1 Introduction

This chapter provides an overview of the PCR rule set structure and details how a customer can create a PCR rule set. PCR rule sets are used to calculate a result for the priority, complexity, and risk rating for a case scenario. Each of the components which make up a PCR assessment is represented as an attribute in the PCR rule set. A rule can have an associated weighting which is added to the overall PCR calculation if it succeeds. The rules then determine the overall rating and classification of the case.

### 4.2 Creating a PCR Rule Set

Each PCR Rule Set must contain a rule class which inherits from the `AbstractPCR` class. This rule class is the class which produces the PCR results to be displayed to the case worker.

To create a PCR rule class, first create the rule class using the CER editor, naming the rule class appropriately.

The usage of the `PCRRuleSet` rule class guarantees that the required attributes are available during rules execution. For more information on setting up rule sets see the `Cúram Express Rules Cookbook` for further details.

A PCR rule set must inherit from the `PCRRuleSet` and provide an implementation for each of the six abstract attribute within the defined rule set. The description attribute is inherited from the root rule class and each solution must also provide its own implementation of this attribute.

### 4.3 Mandatory Rule Attributes

## Cúram Priority, Complexity, Risk Configuration Guide

Rule Attribute	Type	Purpose
caseID	Number	Specified case identifier attribute for which the PCR rules execution relates to.
description	String	This attributes represents the text defining the property description. The value that this attribute contains is a reference to one or more properties in a property file containing the actual text.
priorityRate	Number	This attribute is a calculated attribute representing the relative ranking of the case against a baseline to determine a timeline for response.
priorityReason	String	This attribute represents the text defining the property priority reason. The value that this attribute contains is a reference to one or more properties in a property file containing the actual text.
complexityRate	Number	This attribute is a calculated attribute representing the ranking of a case against a baseline to determine the resource(s) required for a response.
complexityReason	String	This attributes represents the text defining the property complexity reason. The value that this attribute contains is a reference to one or more properties in a property file containing the actual text.
riskRate	Number	This attribute is a calculated attribute represent-

Rule Attribute	Type	Purpose
		ing the relative ranking of a case against a baseline to determine its potential impact to the agency.
riskReason	String	This attributes represents the text defining the property risk reason. The value that this attribute contains is a reference to one or more properties in a property file containing the actual text.

Table 4.1 Mandatory Rule Attributes for PCR Rule Sets

#### 4.4 Specifying Rule Set Properties Text

The rule set properties text is specified by creating an entry in a localized property file as follows:

- Create a property file, for example, PCRSample.properties.
- Add each entry to the property file that will be referenced by the Rule Class attributes. The value of each of these entries is the localized text to be displayed in the application. The following example outlines an example property entry in a PCRSample.properties file and how the property is referenced by a rule set attribute:

```
# This Properties file contains resource
strings for the Sample PCR Rule set.
PCRSample.description=PCRSample
PCRSample.samplePriorityReason=Sample Priority Reason

<Attribute name="description">
  <type>
    <javaclass name="curam.creole.value.Message"/>
  </type>
  <derivation>
    <ResourceMessage
      key="PCRSample.description"
      resourceBundle="curam.pcrsample.rules.PCRSample"
    >
    </ResourceMessage>
  </derivation>
</Attribute>
```

- Add the Properties file entry to the Resource Store by updating the 'Dynamic UIM' section of the Administration Application. In the above example, this entails adding a PCRSample.properties entry in the Dynamic UIM section of the administration application, along with a corresponding page ID, a resource store category, and a properties file.

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