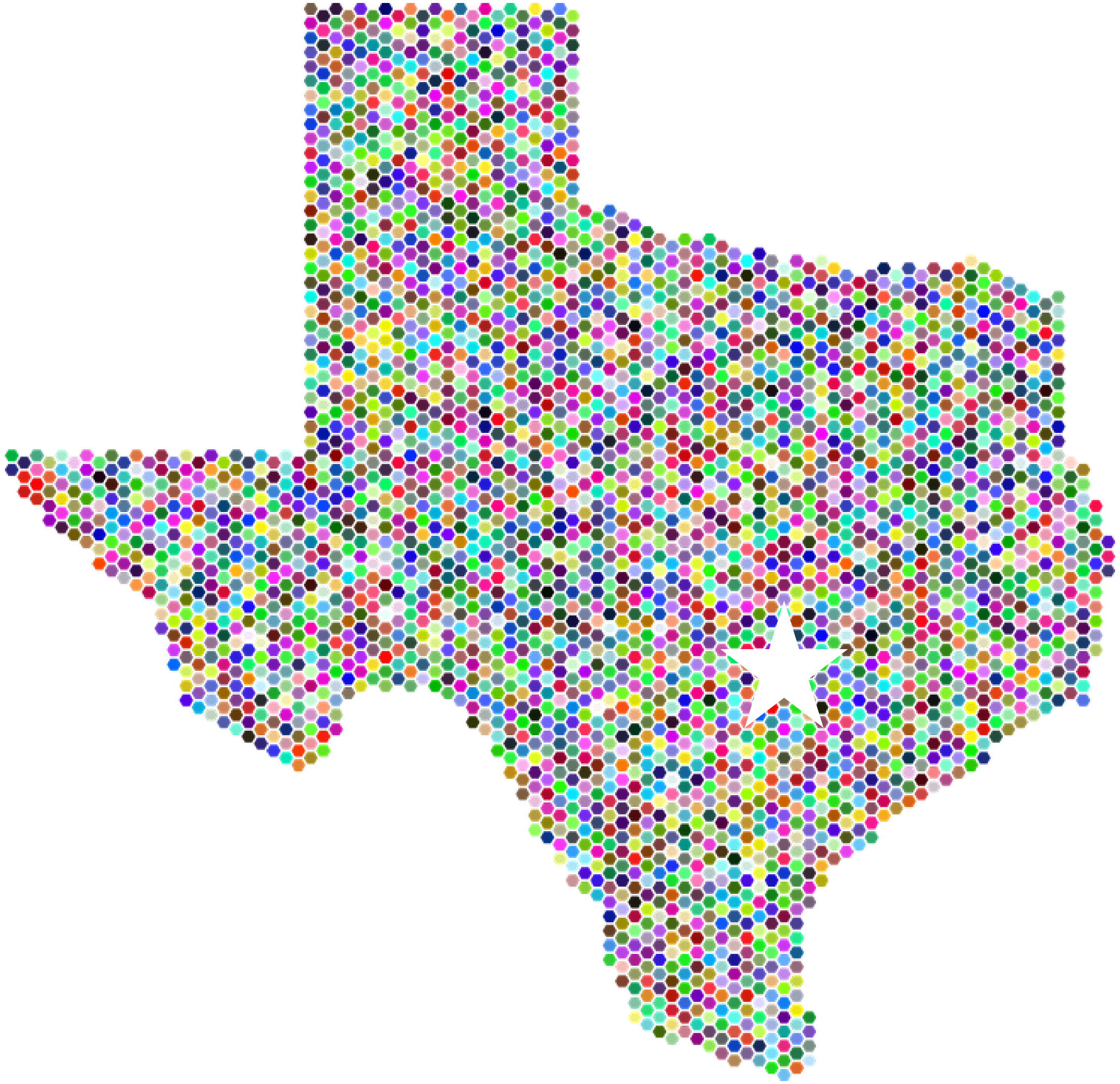
Take Charge Texas (TCT) User Engagement Session

November 15th, 2023



Meet the Facilitators

DSHS/HHSC TEAM

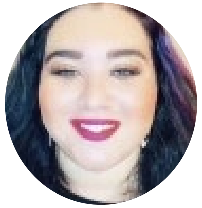
Charletha Joseph
Program Support

Rachel Sanor
THMP Director

Christine Salinas
ADAP Manager

Holly Benavides
TCT Help Desk Manager

Ramani Siddharthan
TCT Help Desk



Ethel Garcia
Medication Data and Analysis Group Manager

DELOITTE TEAM

Nikki Fernandes
Project Manager

Meeta Sharma
Test Lead

Hunter Chernyha
Team Lead/Scrum Master

Krishna Dixit
Consultant/Discovery

Caleb Fingel
Analyst/Discovery

Agenda

1 Introduction & Overview of Objectives

2 TCT Roadmap

3 System Overview: New TCT Features

4 Gathering Your Feedback

5 Close Out & Next Steps

How to Ask Questions:

All lines are muted.

We will save time for your feedback & questions throughout the presentation. Please come off mute and ask questions at that time!

Poll Everywhere

Poll Everywhere

Please navigate to the following Poll Everywhere Link to respond to the following question:

If you are a **DSHS Staff member**, please use this link:
PollEV.com/tctdshsstaff

If you are **not** a DSHS Staff member (agency workers, etc.), please use this link:
PollEV.com/tctnondshsstaff

What do you hope to learn through this session?

Today's Objectives

The objective of today's session is to provide an overview of new features implemented in the TCT system and gather your feedback to ensure the features we plan to implement in the future result in improved client service delivery and health outcomes for people with HIV in Texas.

SYSTEM AWARENESS

Provide this group with **transparency** surrounding the TCT roadmap & future system enhancements so that end-users **gain direct knowledge** of the features we have & plan to implement in TCT.

GATHER FEEDBACK

Gather your **feedback** and **assess opportunities for improvement** of the TCT system.

UPDATE TCT ROADMAP

Review the feedback received with leadership, **prioritize** the features, & **update the TCT Roadmap** accordingly.

TCT Roadmap

Project Plan: Successfully Completed Features

The graphic below represents the features & user stories our team has developed since initiation of Enhancements in January 2023.

Sprint 1

Focused on RSR submission in TCT System, supporting multiple agencies as they submitted the annual report, in addition to establishing a new client creation process.

Sprint 2

Focused on establishing the framework to initiate an automated client merge process, in addition to features for task board which provided a seamless workflow for TCT users.

Sprint 3

Focused on establishing an automated client merge process which reduced the lengthy manual client merge process, updating Share Status capabilities, and enabling the privatization of Case Notes

Sprint 4

Focused on the creation of a drug regimen override process as well as other Pharmacy Portal enhancements, and the introduction of Standard Deduction process for determining THMP Eligibility

User Stories

Sprint 1
- Client Import into TCT & New Client Creation
- TCT Client Import – Successful Creation
- TCT Client Import – Failed Creation
- Adding EUCI Code as a Search Parameter
- Updating 'Sex at Birth' to an Editable Field

Sprint 2
- Identification of Potential Duplicates
- Client Merge Automation Rules
- UI Screen: Duplicate Client Report
- Inactivating 'Apply Now' for Linked Clients
- Updating Filters to Multi-Select Values
- Addition of THMP Subprograms
- Addition of Date Submitted Filters

Sprint 3
- Client Merge Report
- Exception Messages for Failed Merges
- Client Merge Automation Rules
- Split CARE & THMP Services in 'My Needs'
- Adding New Case Note Categories
- Allowing for Private Case Notes
- Updating Share Status in Agency Portal
- Updating Task Board Permissions
- Edit THMP Subprograms

Sprint 4
- Manage Approvals & Denials Of Client Regimen Overrides
- Add Pharmacy Information To Shipping Details
- Order Override Request
- Day Supply Limitations On Add Prescribed Drug & Worker Portal Order Screens
- Client Merge Report Agency Filter
- Drug Approval & Regimen Drop Date Details
- Submitting Client Regimen Overrides
- Separate Spouse/Partner/Common Law Relationship Options
- Standard Deduction Reference Table Management
- Standard Deduction – THMP Adjusted Household FPL

Project Plan: Successfully Completed Features

The graphic below represents the features & user stories our team has developed since initiation of Enhancements in January 2023.

Sprint 5

Focused on the establishment of pharmacy site creation as well as pharmacy order creations. Provided additional features in maintaining client status activities

Sprint 6

Focused on creating Pharmacy reports as well as notification letters for Pharmacy related updates on Client profiles. Provides additional immunization report capabilities.

Sprint 7

Focused on the application workflow enhancements as well as client merge/linking history. Provided improvements to Task Board for processing applications effectively.

User Stories

Sprint 5

- Creation of Secondary Sites
- Assigning Secondary Sites to Clients
- Display Additional Client Results on Order Dashboard
- Open Order Enhancements
- Agency Assigned ID Numbers (AIDN)
- Prevent Updates to THMP Subprograms on Task Board from Updating Application History
- Addition of Emergency Screening Questionnaire Page to All Applications
- Update Permissions for Inactivating Clients
- Allow Access to Profiles of Inactive Clients

Sprint 6

- Shingrix Vaccine Enhancements
- Exclude ADAP Clients on Hold From the Clients Coming Up For Renewal Report
- Update Client Letter Templates
- Monthly Pharmacy Orders Report
- Generating Letters by Client ID
- Update Letter Triggering Conditions
- Client/Pharmacy Update Letter Pharmacy Copy
- Client Order Count by Medication Report

Sprint 7

- Update Hyperlink in Client Portal
- Expand Provider Agencies for Selection on Application Workflow
- Combine Household Details Questions on Clients' Relationship Pages
- Display Only Active Provider Agencies on Agency Selection Screen & Task Board
- Display Master Client ID in Edit Client Profile & Merge/Linking History
- Update Mpox Language in TCT
- Pharmacy Cover Letter Updates
- Task Board – Displaying Reason for Emergency Application
- Performing Bulk Edits on the Task Board: THMP Owner & CARE Owner
- Remove THMP Region from User Scope Assignment

Project Plan: Successfully Completed Features

The graphic below represents the features & user stories our team has developed since initiation of Enhancements in January 2023.

SPRINT 8

Focused on enhancements of Agency Portal Client Pages and updates to Client Merge process. Provided enhancements to Eligibility and Client Import process.

SPRINT 9

Focused on providing enhancements to the Pharmacy Portal and improving client privacy in the TCT Portal. Additionally, enhancements were provided to the Medical and Client Services import process for agencies.

SPRINT 10

Focused on enhancing the financial information, FPL process and history tracking capabilities for financials and insurance. Additionally, updated the SFTP process for Medical and Services imports to allow for increased data import volume.

User Stories

Sprint 8

- Creating History Logs: Relationships
- Creating History Logs: Medical Data
- Creating History Logs: About You Information
- Creating History Logs: Authorized Release
- Updates to Automated & Manual Merge Exception Handling
- Updates THMP Denial, Pend, Reject Reasons when Overriding Eligibility Recommendation
- Ability to Manually End Ongoing Eligibility
- Displaying Override Comments after Eligibility is Complete
- Capturing Hold History for Manual/Automatic Holds
- Update Create Client Import XML to Include AIDN

Sprint 9

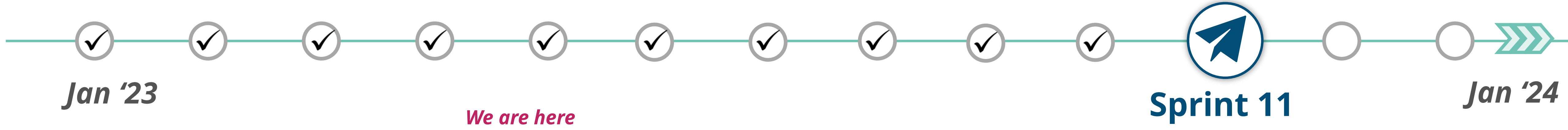
- Masking SSN on Client Search and Client Details Screens
- Display Created By on Order Dashboard
- Notification for Order Override Denials for Pharmacist
- Notification for Order Override Approvals for Pharmacist
- Pharmacy Notes on Pharmacy Details Screen
- Merging Eligibility Records by Eligibility Decision Date for Clients with the Same Subprogram
- Addition of TX Department of State Health Services on the HAB Report
- HAB Report – Multiple Agency Selection
- Generating Pharmacy Copy Letters Based on Latest Transaction
- Updated Services Import XML Process to Include AIDN
- Updated Medical Import XML Process to Include AIDN

Sprint 10

- Client Financial Information Enhancements
- Creating History Log: Financial Data
- Relationships Screen Enhancements
- Creating History Log: Insurance History
- Pharmacy Portal: Indication Whether Batches were Received
- Resubmission Process for Resubmission of Orders
- RSR: Calculating Missing FPL Values for CARE Clients via Batch
- FPL Process: Create Client Import Process Enhancement
- STFP Process: Service Records Updates
- STFP Process: Service Records – Successful Client Update Email
- STFP Process: Service Records – Failed Client Update Email
- STFP Process Medical Records Updates
- STFP Process: Medical Records – Successful Client Update Email
- STFP Process: Medical Records – Failed Client Update Email

Project Plan: In Progress Features

The graphic below represents the features & user stories our team is currently consuming for Sprint 11.



Focusing on enhancing the Financial Information and its history, updating the FPL process to accommodate TCT and non-TCT Portal Clients for RSR Reporting, in addition to curating pharmacy report for overrides. Furthermore, established SFTP process for Medical and Services Import through Global Scape.

- Document Start and End Date Enhancements
- Standardize Login Error Messages in Agency Portal
- FPL: Overriding System Derived Household FPL for CARE Clients
- Enhancements to Comments Provided When Overriding or Ending Eligibility
- TCT Client Portal – Instructional Text Updates
- Order Override Accessibility Enhancement
- Shipment Resubmission Overrides
- Client Medicine Order History Enhancements
- Pharmacy Report: Client Regimen Overrides
- Pharmacy Report: Order Overrides
- Ad Hoc Query: Facility Information Enhancements
- Removing Pre-Selected Services on Recert and Self-Attest Applications
- Real Time Order Submission to PIMS
- Real Time Order Status Updates from PIMS

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Project Plan: Upcoming Features

The user stories below indicate all Highest & High priority stories in the backlog.

*

Sprint 12 11/27 – 12/22	Sprint 13 1/2 – 1/26
★ Agency Portal Client Pages	◆ Reports
★ Pharmacy Portal	
◆ Contracts	
◆ Eligibility	
★ Pharmacy Reports	
◆● Reports	

Key

★	THMP
◆	CARE
●	General

This project plan is subject to change as priorities may change.

Poll Everywhere

Poll Everywhere

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PollEV.com/tctdshsstaff

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How beneficial are the upcoming TCT System enhancements for your role? Please click on the appropriate number to submit your answer.

System Overview: New TCT Features

Live Demonstration of TCT Features

TCT Features Video Presentation

- Client Financial Information Enhancements & Creating History Log: Financial Data
- Relationships Screen Enhancements
- Creating History Log: Insurance History
- Pharmacy Portal: Indication Whether Batches were Received
- FPL Process: Create Client Import Process Enhancement & RSR: Calculating Missing FPL Values for CARE Clients via Batch
- STFP Process: Service Records – Service Records Updates, Successful Client Update Email, Failed Client Update Email
- STFP Process: Medical Records – Medical Records Updates, Successful Client Update Email, Failed Client Update Email

Gathering Your Feedback

Poll Everywhere

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What additional items would you like to see for these sessions?

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How to Provide Feedback to TCT?

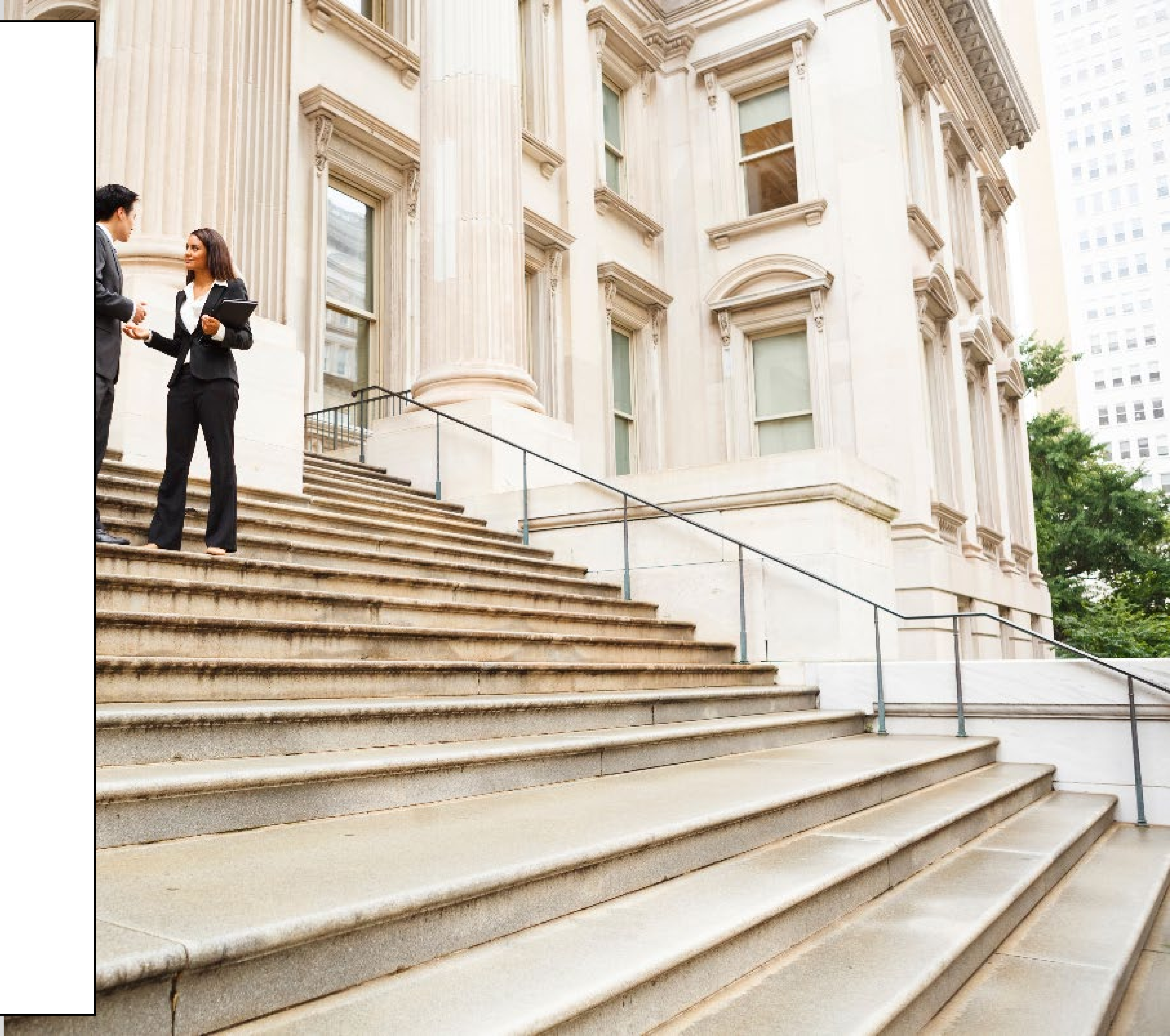
The **TakeChargeTexas Portal**, is a system with a goal to benefit all end users – providers, admins and clients. To achieve future growth and scale, **we request you to provide your suggestions and feedback.**

Our team always welcomes your feedback!
Please feel free to reach out to **Charletha Joseph** at **Charletha.Joseph@dshs.texas.gov**.

Reasons to Provide Feedback

- [ ] TCT System will include enhancements that cater to your responsibilities!
- [ ] Your Clients will benefit with the Enhancements and Maintenance of the System!

Next Steps



Upcoming Activities

Please reach out Charletha for any questions related to this presentation.

Charletha Joseph

Charletha.Joseph@dshs.texas.gov

- Our team will **share this presentation** with this group following this session.
- Our team will host the **next TCT User Engagement session** on Wednesday, December 20th .

Thank You!

System Overview: New TCT Features

Feature Updates: Sprint 10

Creating History Log: Insurance History

TCT Users will now be able to click on 'Insurance History', on the left navigation panel of a Client's dashboard and view a screen which details the updates conducted on the Insurance screen for specific fields post the implementation of this feature

Insurance History

This page is a read-only summary of the client's insurance.

Current Insurance Details

Updated By	Start Date	End Date	Insurance Type	Actions
1500007942	10/27/2021	01/27/2022	I do not currently have health insurance or have lost my insurance more than 90 days ago	History

Previous Insurance History

Updated By	Insurance Removed Date	Start Date	End Date	Insurance Type	Actions
		N/A			

A History hyperlink will be available for Users to click on, and view a pop-up with all the updates for that particular Insurance Type.

The Insurance History screen will track the updates for specific data elements on each of the different Insurance Types. The Insurance History screen will populate the table with the applicable Insurance name and its related table columns.

On the Client Dashboard (Agency Portal), clicking of 'x' will remove it from the main Insurance page. The Previous Insurance History table on the Insurance History screen will include a table titled 'Insurance Removed Date'. This column will indicate the date that the particular insurance was removed from the Insurance Information screen.

Previous Insurance History Log

Previous Insurance History Log

County indigent health plan

Updated By	Date	Start Date	End Date	Insurance Removed Date
admin ,admin	11/03/2023	11/02/2023	11/30/2023	11/03/2023
admin ,admin	11/03/2023	11/02/2023	11/30/2023	

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Close

Current Insurance History Log

Current Insurance History Log

Private/employer insurance or Veteran's Affairs (VA) insurance

Updated By	Date	Start Date	End Date	Policy Holder's First Name (if other than client)	Policy Holder's Last Name (if other than client)	Prescription Drug Plan Name	Individual Policy Number	Policy Holder's Date of Birth (if other than client)	Insurance Phone Number	Group Number	RX Bin Number	Relationship of Policy Holder to Client
[redacted]	11/01/2023	01/01/2023		[redacted]	[redacted]		[redacted]		[redacted]	[redacted]	[redacted]	
[redacted]	11/01/2023	01/01/2023					[redacted]		[redacted]			--

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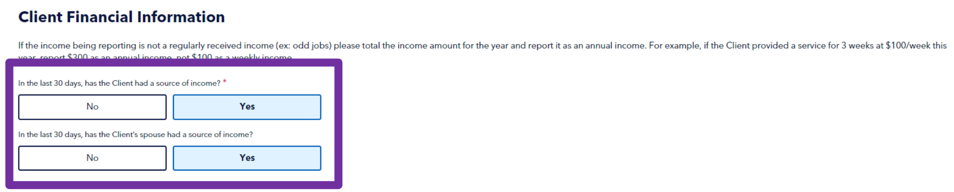
Close

TCT Users will be able to track when changes are made to the Insurance of a client so that they can be aware of the client's past insurance records.

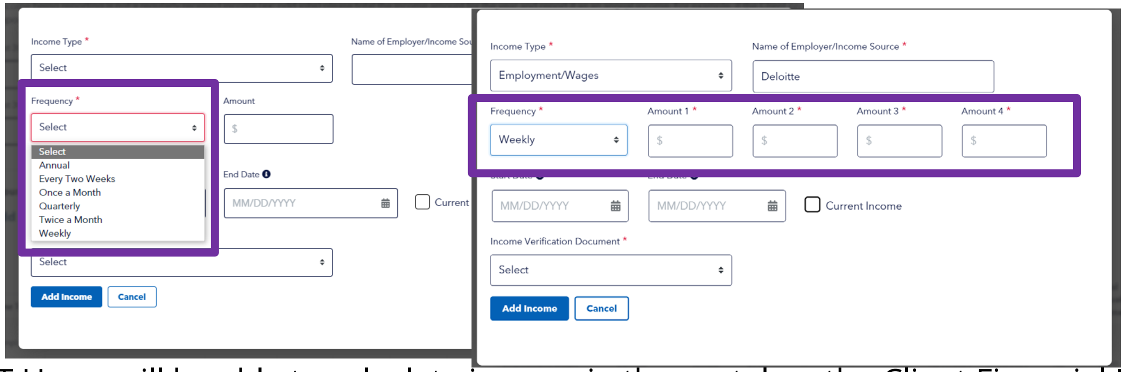
Feature Updates: Sprint 10

Client Financial Information Enhancements

TCT Users will now be able to view updated questions on the Client Financial Information screen on the Client dashboard as well the application workflow, in both Agency and Client Portal (Client Portal will display English and Spanish text).



The Frequency field is updated to include 'Annual' income, and is updated to display updated verbiage and The number of Amount fields which display on the Add Income pop-up will depend on the Frequency selected



Users will be able to view a new mandatory field titled, 'Income Verification Document', for them to indicate what type of verification documentation they will be submitting

The Client Financial Information screen will be displayed in a tabular format. It will display a new column, titled 'Total Annual Income'. This field will be populated based on the income logic below for each frequency type when User clicks on Save on the Add Income pop-up.

Only the following roles will now have the ability to delete Client Income records:

- *HRAR Admin*
- *AA Data Manager*

When an income record has been deleted, the record along with the History will not be retained on the page

The Countable Income Screen will have a new column titled 'Calculated Total Annual Income' next to the Relationship column. The value populated here will be pulled from the Client Financial Information screen from the 'Calculated Total Annual Income' field.

TCT Users will be able to calculate income in the portal on the Client Financial Information screen, so that it can assist with client eligibility determination.

Feature Updates: Sprint 10

Creating History Log: Financial Data

TCT Users will now be able to click on the 'History', in the 'Actions' column of the 'Your Source(s) of Income' and 'Spouse, Partner, or Household Member Source(s) of Income' tables and view a pop-up which details the updates conducted related to this screen for specific fields post the implementation of this feature

The data elements that will be tracked for history are:

- *Household Member, Spouse, or Partner Name*
    - *Only tracked in the 'Spouse, Partner, or Household Member Source(s) of Income' table*
- *Income Type*
- *Name of Employer/Income Source*
- *Frequency*
- *Amount*
- *Employment Start Date*
- *Employment End Date*
- *Current Income*
- *Total Annual Income*
- *Income Verification Document*

'Your Source(s) of Income' History Log

Client Financial History Log

Added By	Added On	Income Type	Name of Employer/Income Source	Frequency	Amount	Start Date	End Date	Current Income	Total Annual Income	Income Verification Document
testhraradmin	11/03/2023 1:57 PM	Employment/Wages	ABC Company	Every Two Weeks	\$200.00, \$350.00, \$0.00, \$0.00	10/01/2023	--	Yes	\$7,150	Employer statement (provides current income and pay frequency)

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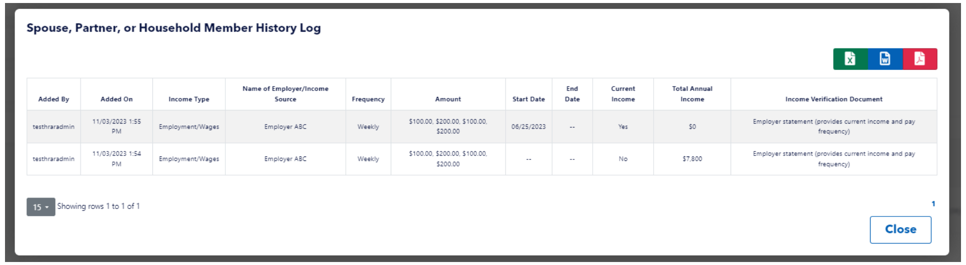
Close

'Spouse, Partner, or Household Member Source(s) of Income' History Log



Spouse, Partner, or Household Member History Log

Added By	Added On	Income Type	Name of Employer/Income Source	Frequency	Amount	Start Date	End Date	Current Income	Total Annual Income	Income Verification Document
testhraradmin	11/03/2023 1:55 PM	Employment/Wages	Employer ABC	Weekly	\$100.00, \$200.00, \$100.00, \$200.00	06/25/2023	--	Yes	\$0	Employer statement (provides current income and pay frequency)
testhraradmin	11/03/2023 1:54 PM	Employment/Wages	Employer ABC	Weekly	\$100.00, \$200.00, \$100.00, \$200.00	--	--	No	\$7,800	Employer statement (provides current income and pay frequency)

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Close

TCT users will track when changes are made to the Client Financial Information page of a client so that they can be aware of the client's past income history.

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Feature Updates: Sprint 10

Relationships Screen Enhancements

This sentence will also appear on the Relationship of all application types in the Agency Portal.

On the Relationship screen beneath the Household Members subtitle, the below sentence will be displayed:

- *Users may not be able to delete household member records as the ability to delete a household member is restricted to specific User Roles*

TCT Users will be able to view a help text on the Relationships screen so that they can be guided as to who has the capability to delete records.

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Feature Updates: Sprint 10

Pharmacy Portal: Indication Whether Batches were Received

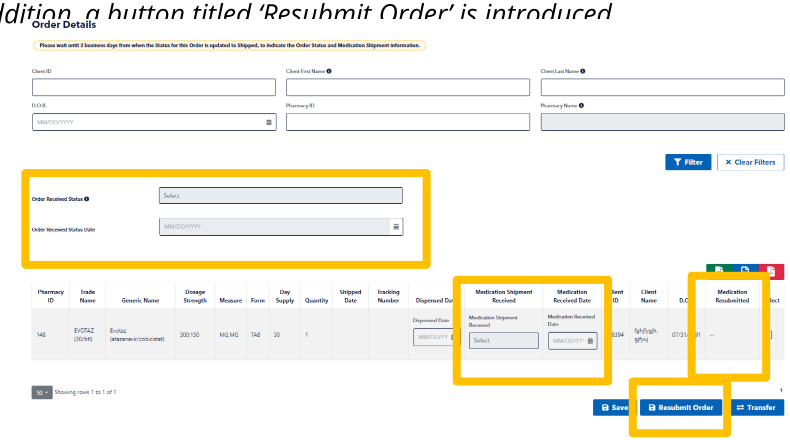
On the top of the Order Details screen, display the below warning message:

“Please wait until 3 business days from when the Status for this Order is updated to Shipped, to indicate the Order Status and Medication Shipment information.”

The Order Details screen will have the following new fields / columns:

o Order Received Status, Order Received Status Date, Medication Shipment Received, Medication Received Date, Medication Resubmitted

In addition, a button titled ‘Resubmit Order’ is introduced



Medication Resubmission Process

- *If the status in the Order Received Status field is indicated as Partial Order Received, then the User must indicate the individual medication(s) which are not received and which medications have been received on the Order Details screen. For the medications which are indicated as Not Received in the Medication Shipment Received column, User will have to select the checkbox in the Select column and proceed forward with clicking on the Resubmit Order button.*
- *If the status in the Medication Shipment Received column is indicated as Medication Received, when those medications are selected, then the Resubmit Order button will be greyed out.*

Only the following roles can edit the Order Received Status, Order Received Status Update, Medication Shipment Received, and Medication Received Date fields:

- *ADAP Order Processor, HRAR Admin, Pharmacist associated with the Pharmacy which the Order is for.*

TCT pharmacists will be able to indicate whether they have received a shipment of medications in TCT so that they can provide comments when they notice a bottle of medication may be missing from the shipment.

Feature Updates: Sprint 10

RSR: Calculating Missing FPL Values for CARE Clients via Batch

The system will run a batch at the beginning of each calendar year to calculate the Household Federal Poverty Limit (FPL) for the previous year for RSR reporting purposes for clients that meet all of the following conditions:

(a) The client received CARE services during the RSR reporting period (Indicated by the 'Date' column on the Client Services page)

(b) The client did not have a CARE eligibility period that fell within the RSR reporting period

If the above conditions are met and THMP eligilbity was run for the client during the RSR reporting period, the batch will use the Household Income FPL % calculated as part of THMP eligibility and reflect this value on the RSR Report

- *This value can be found on the Eligibility Recommendation page once THMP eligibility has been run. System will look at the 'Household Income' value and not the 'THMP Adjusted Household Income'*

If the above conditions are met but THMP eligibility was not run for the client during the RSR reporting period, the batch will check to be sure the following conditions are also true:

(c) The client has at least one document uploaded with a Document Category of 'Proof of Income'

(d) The client has their 'Proof of Income' document verified through the Multi-Provider Document Verification page or the Document Verification page (accessed as part of running eligibility)

- *Proof of Income documents that were verified by THMP staff when processing THMP eligibility will be considered as meeting this condition*
- *On the Multi-Provider Document Verification page, the 'Proof of Income' document is only required to be verified by one provider agency, even if the client is receiving CARE services at multiple provider agencies*

When conditions (a), (b), (c), and (d) are met, the batch will use the calculation logic to derive the Household Federal Poverty Limit (FPL) for clients meeting the above criteria:

The following new fields will be created on the CARE Service Referral screen:

- *System Derived Household FPL*
    - *Displayed beneath the 'Household Income' field*
    - *This is a non-editable field and will be populated with the Household FPL that was calculated by the batch*
- *System Derived Household FPL Source*
    - *This is a non-editable field that will reflect a value of 'FPL Batch' when the Household FPL data is generated by the batch process*
- *System Derived Household FPL Date*
    - *This is a non-editable field that will reflect the date the FPL batch ran and generated the System Derived Household FPL value*

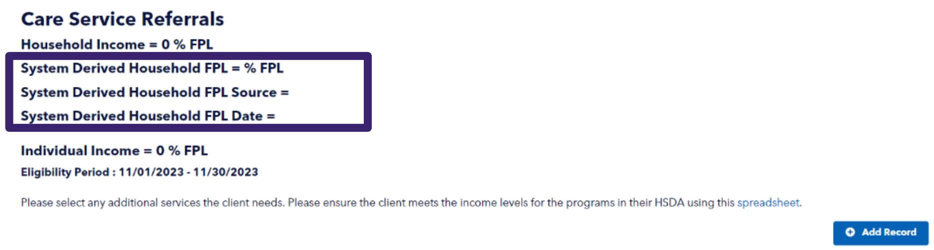
TCT Users will be able to run a batch at the beginning of the calendar year to calculate the Household FPL for clients missing this data that received CARE services during the RSR reporting period, so that this information is reflected on the RSR Report.

Feature Updates: Sprint 10

FPL Process: Create Client Import Process Enhancement

The Create Client Import XML file is enhanced to include the following field:

- *Household FPL*
  - *This field will indicate the FPL value the Agency has calculated in their system and is providing to be part of the RSR Report.*
- *Household FPL Date*
  - *This field will accept a MM/DD/YYYY format and will indicate the date that the Agency calculated the client's FPL in their system.*
  - *If a value is provided in the Household FPL field, this field will become mandatory*



Upon import, the data will be reflected on the Care Services Referrals screen with the below updated fields:

- *System Derived Household FPL*
  - *The value provided in the Household FPL field in the xml file will be displayed in this field (no further calculation is required to be done in the system to confirm or re-calculate the FPL value)*
- *System Derived Household FPL Source*
  - *This is a non-editable field that will reflect a value of 'Create Client Import' when the Household FPL data is provided through the Create Client Import process*
- *System Derived Household FPL Date*
  - *This is a non-editable field that will reflect the value provided in the Household FPL Date field in the xml file*

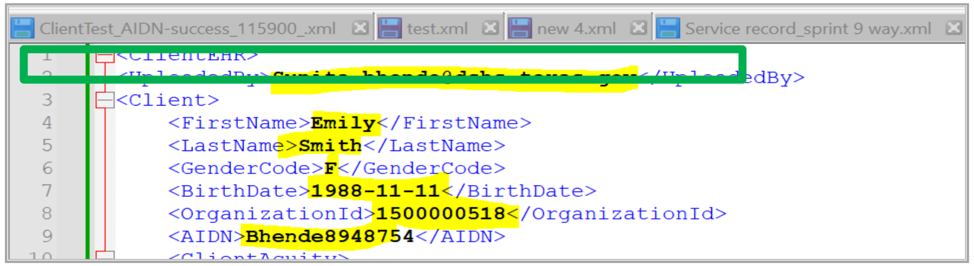
Data Managers will be able to import the Federal Poverty Limit (FPL) value from a client's eligibility from their legacy system into TCT Portal so that this value can be used in the RSR report if eligibility was not run for the client within the RSR reporting period.

Feature Updates: Sprint 10

STFP Process: Service Records Updates

The Services Import XML file format which is used in the TCT import process will be used for the SFTP process. There is a new mandatory field, titled 'UploadedBy' added to the XML file and will be used to capture the email address of the user importing the file

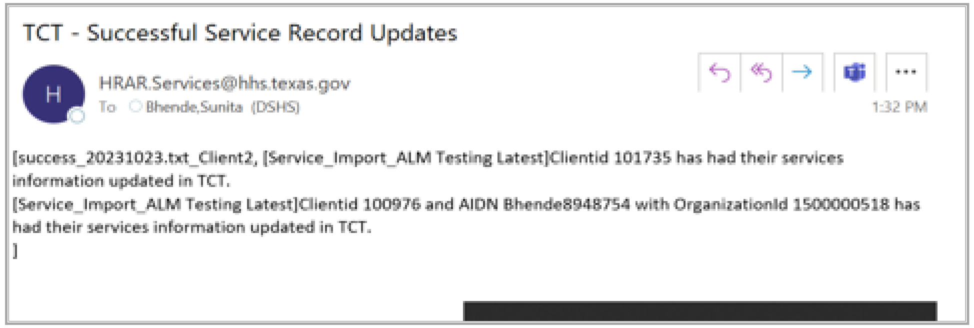
- *A Globalscape folder will be created for data managers to place the Services XML files*
- *A nightly batch process will pick up the Services XML files in the Globalscape folder for processing*



Data Managers will be able to use a secure file transfer process as an alternative to the Services Import Process to update a client's Services information in TCT, so that they update a larger number of client records at a single time.

STFP Process: Service Records – Successful Client Update Email

When a client's Services information is successfully updated in TCT as part of the SFTP process for Service Record Updates, an email notification will be triggered and sent to the email provided in the Uploaded By field.

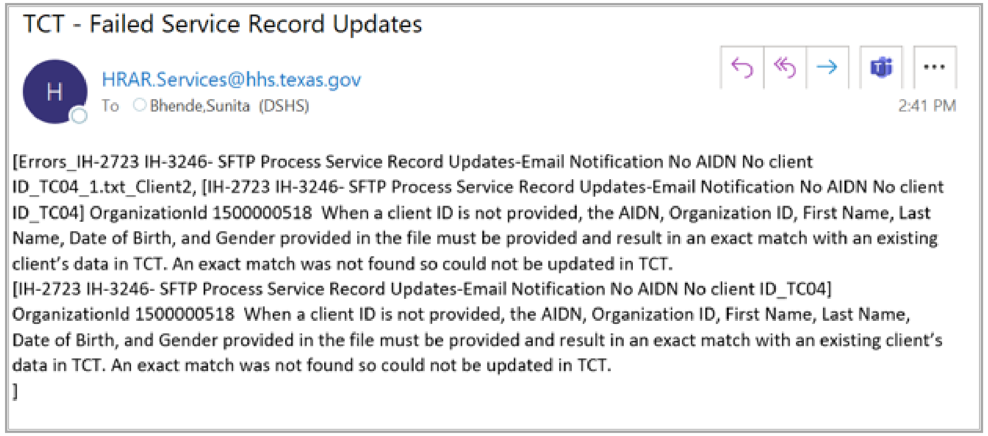


Data Managers will be able to receive an email when a client's Services information has been successfully updated in TCT through the SFTP process.

Feature Updates: Sprint 10

STFP Process: Service Records – Failed Client Update Email

When a client's Services information is not successfully updated in TCT as part of the SFTP process for Service Record Updates, an email notification will be triggered and sent to the email provided in the Uploaded By field. The email will also notify the User the reason for failure.



TCT - Failed Service Record Updates

HRAR.Services@hhs.texas.gov
To Bhende,Sunita (DSHS)
2:41 PM

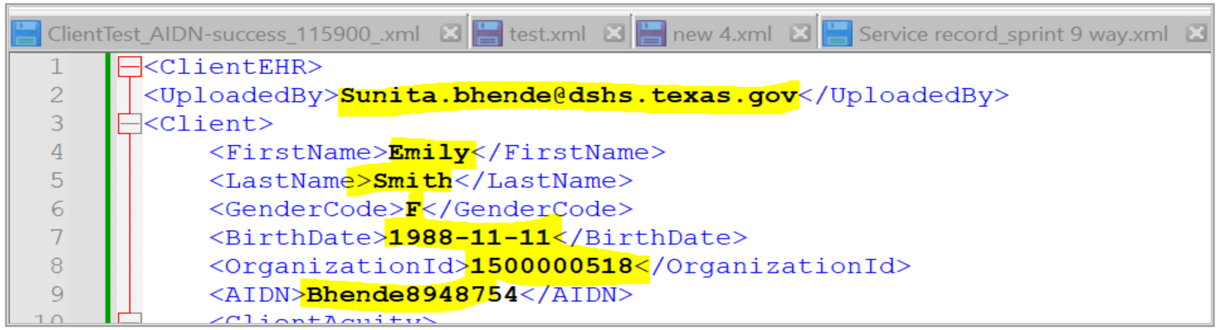
[Errors_IH-2723 IH-3246- SFTP Process Service Record Updates-Email Notification No AIDN No client ID_TC04_1.txt_Client2, [IH-2723 IH-3246- SFTP Process Service Record Updates-Email Notification No AIDN No client ID_TC04] OrganizationId 1500000518 When a client ID is not provided, the AIDN, Organization ID, First Name, Last Name, Date of Birth, and Gender provided in the file must be provided and result in an exact match with an existing client's data in TCT. An exact match was not found so could not be updated in TCT.
[IH-2723 IH-3246- SFTP Process Service Record Updates-Email Notification No AIDN No client ID_TC04] OrganizationId 1500000518 When a client ID is not provided, the AIDN, Organization ID, First Name, Last Name, Date of Birth, and Gender provided in the file must be provided and result in an exact match with an existing client's data in TCT. An exact match was not found so could not be updated in TCT.
]

Data Manager will be able to receive an email when a client's Services information has not been updated in TCT through the SFTP process, so that they are aware of the reason for failure.

STFP Process Medical Records Updates

The Medical Import XML file format which is used in the TCT import process will be used for the SFTP process. There is a new mandatory field, titled 'UploadedBy' added to the XML file and will be used to capture the email address of the user importing the file

- *A Globalscape folder will be created for data managers to place the Medical XML files*
- *A nightly batch process will pick up the Medical XML files in the Globalscape folder for processing*



Data Managers will be able to use a secure file transfer process as an alternative to the Medical Import Process to update a client's Medical information in TCT, so that they update a larger number of client records at a single time

 |

Feature Updates: Sprint 10

STFP Process: Medical Records – Successful Client Update Email

When a client's Medical information is successfully updated in TCT as part of the SFTP process for Medical Record Updates, an email notification will be triggered and sent to the email provided in the Uploaded By field.

TCT - Successful Medical Record Updates

H HRAR.Services@hhs.texas.gov
To Bhende,Sunita (DSHS)
Thu 10/26

[success_20231026.txt_Client1, [SIT2_Test_Exact and CLientID_26th oct_V11]Clientid 101852 has had their medical information updated in TCT.
]

Data Managers will be able to receive an email when a client's Medical information has been successfully updated in TCT through the SFTP process, so that they are made aware of the updates.

STFP Process: Medical Records – Failed Client Update Email

When a client's Medical information is not successfully updated in TCT as part of the SFTP process for Medical Record Updates, an email notification will be triggered and sent to the email provided in the Uploaded By field. The email will also notify the User the reason for failure.

TCT - Failed Medical Record Updates

H HRAR.Services@hhs.texas.gov
To Bhende,Sunita (DSHS)
10:00 AM

[Errors_No AIDN and No client ID_1.txt_Client2, [No AIDN and No client ID]Clientid 0When a client ID is not provided, the AIDN, Organization ID, First Name, Last Name, Date of Birth, and Gender provided in the file must be provided and result in an exact match with an existing client's data in TCT. An exact match was not found so could not be updated in TCT.
[No AIDN and No client ID]Clientid 0When a client ID is not provided, the AIDN, Organization ID, First Name, Last Name, Date of Birth, and Gender provided in the file must be provided and result in an exact match with an existing client's data in TCT. An exact match was not found so could not be updated in TCT.
]

Data Managers will be able to receive an email when a client's Medical information has not been successfully updated in TCT through the SFTP process, so that they are made aware of the updates.

