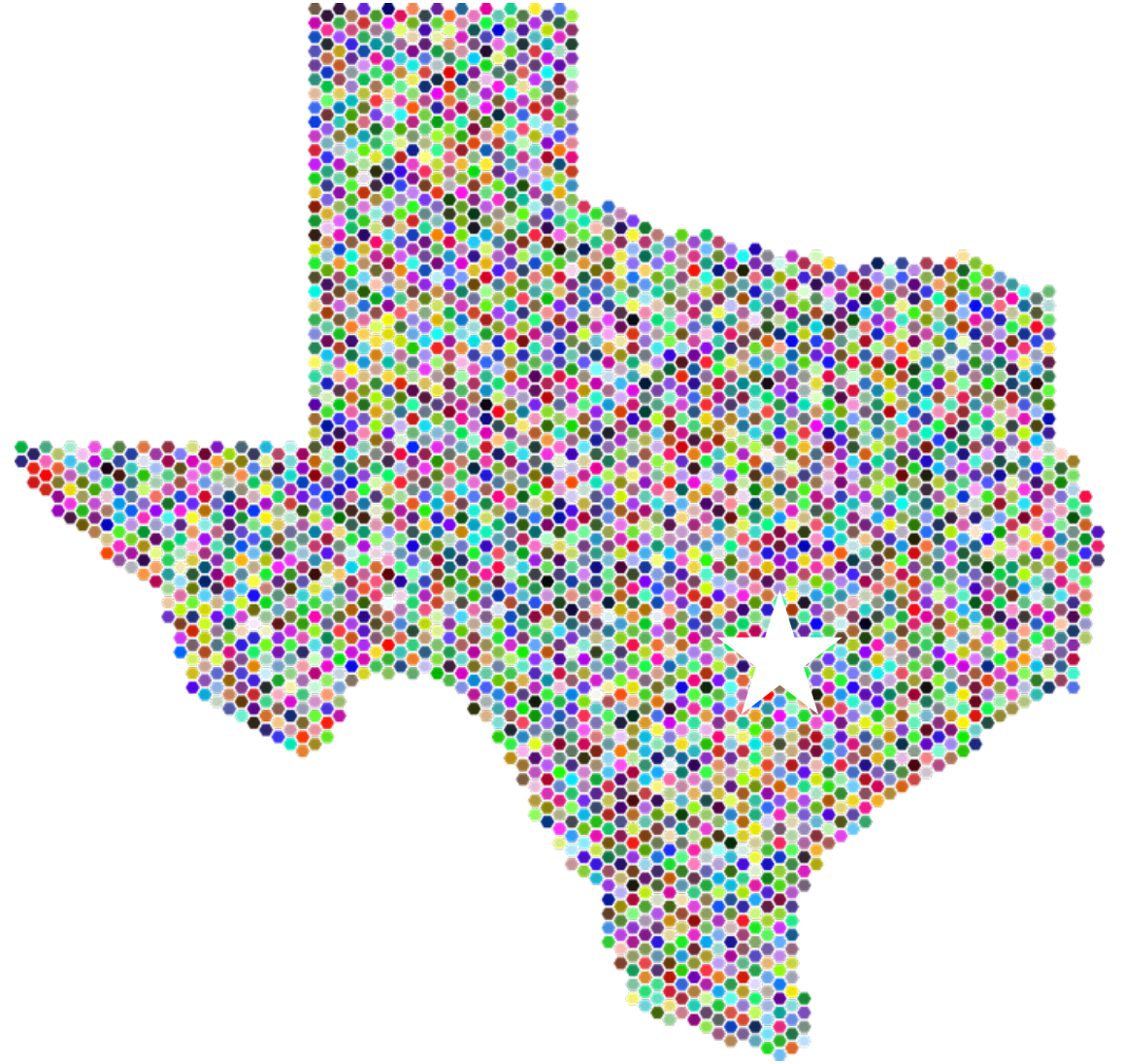


Take Charge Texas (TCT) User Engagement Session

October 19th, 2023



Meet the Facilitators



Charletha Joseph
Program Support



Holly Benavides
TCT Help Desk Manager

DSHS/HHSC TEAM



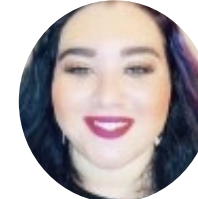
Rachel Sanor
THMP Director



Ramani Siddharthan
TCT Help Desk



Christine Salinas
ADAP Manager



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

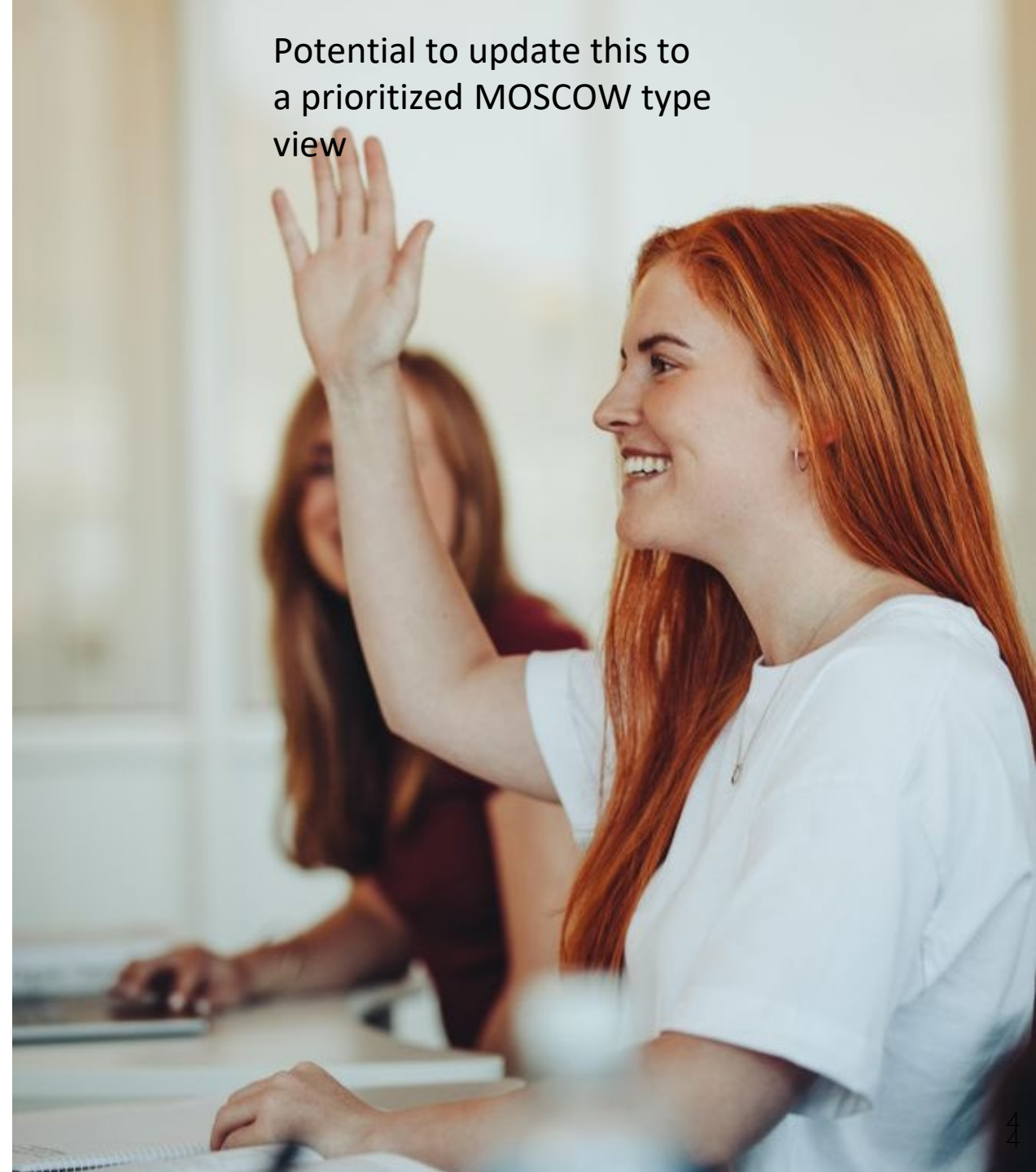
Please navigate to the following Poll Everywhere Link to respond to the following question:

If you are a **DSHS Staff member**, please use this link:
[**Pollev.com/tctdshsstaff**](https://Pollev.com/tctdshsstaff)

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

What do you hope to learn through this session?

Potential to update this to a prioritized MOSCOW type view



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.



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.



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.

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

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

Project Plan: In Progress Features

The graphic below represents the features & user stories our team is currently consuming for Sprint 8.



Project Plan: Upcoming Features

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

*

Sprint 11 10/30 – 11/24	Sprint 12 11/27 – 12/22	Sprint 13 1/2 – 1/26
★ ● Agency Portal Client Pages ★ Pharmacy Portal ● Application Workflow ★ Pharmacy Reports ● Client Portal	◆ Reports	◆ Reports

Key

★

THMP

◆

CARE

●

General

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

Poll Everywhere

Poll Everywhere

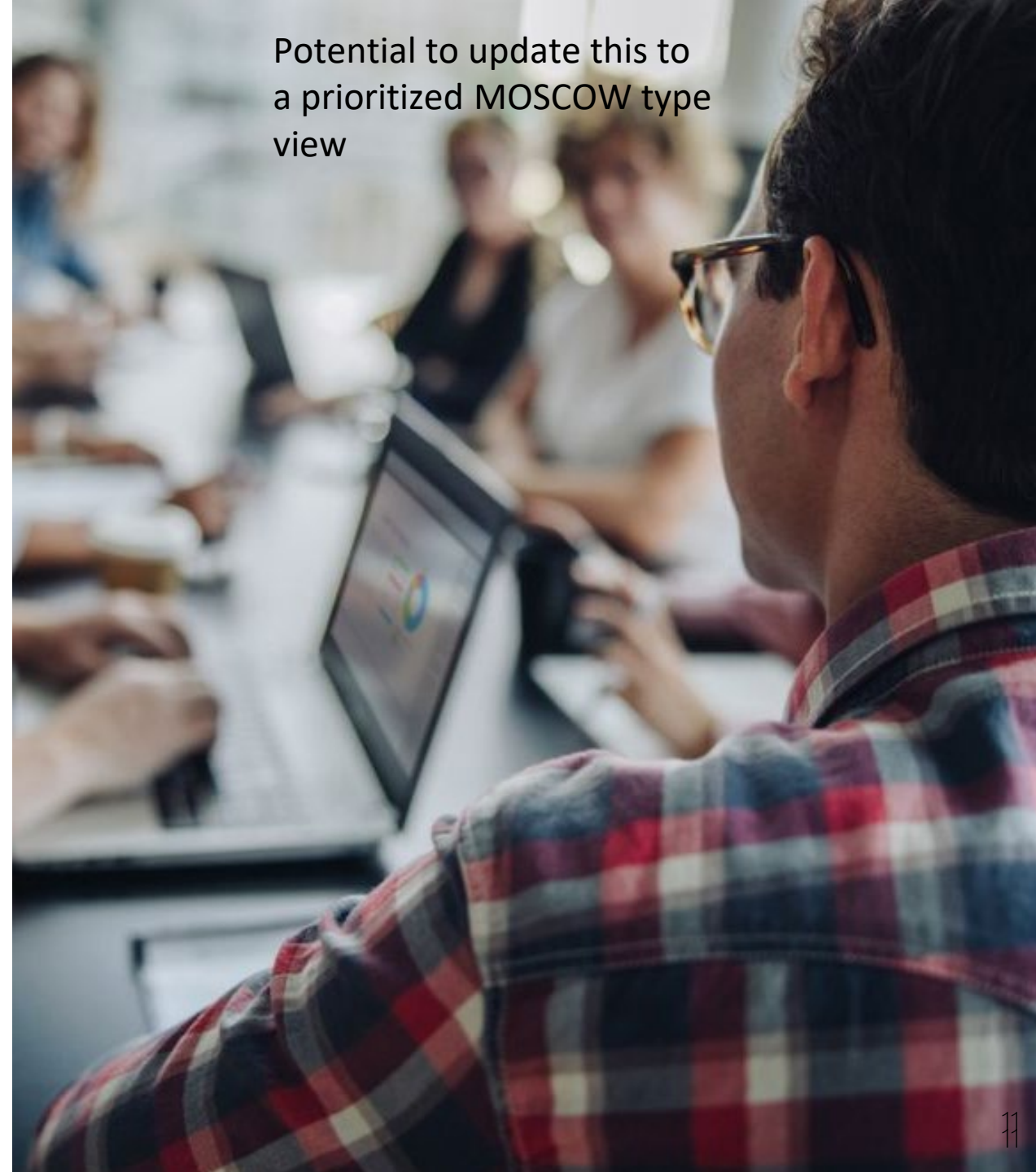
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PolIEV.com/tctdshsstaff

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

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

Potential to update this to a prioritized MOSCOW type view



System Overview: **New** TCT Features



Live Demonstration of TCT Features

TCT Features Video Presentation

- [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 – 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](#)



Gathering Your Feedback



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 additional items would you like to see for these sessions?



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 Thursday, November 16th.

Thank You!

System Overview: **New** TCT Features



Feature Updates: Sprint 9

Masking SSN on Client Search and Client Details Screens

Client Search Screen

- The first image displays the results when a User searches by any of the search criteria on the screen, the results table will mask the first 5 digits and only display the last 4 digits of a record's Social Security Number (SSN) in the SSN/ITIN column, with an eye icon to unmask if the User prefers to view the full value.
- The second image displays a User searching by entering in the full Social Security Number, and will have an eye button to unmask if the User prefers to view it. When a User is typing in the values, it will be completely masked with dots. This will happen immediately upon typing values into the field.

Create New Client Screen

- On this screen, when a user is typing in the values for Social Security Number (SSN) field, it will be completely masked with dots, with an eye button to unmask if the User prefers to view it.

Client Details Screen

- On this screen, the Social Security Number (SSN) field will be completely masked with dots, with an eye button to unmask if the User prefers to view it.
- This will also be applicable when a User creates a new client in TCT Portal through the Create New Client Import (.xml file).

New Client

Please enter the details below to create a new client. Make sure you had searched for the client in HRAR before you create them to avoid creating a duplicate client.

First Name * Middle Name Last Name *

Client ID Mother's Maiden Name

Gender * Date of Birth * Gender *

Social Security Number Individual Taxpayer Identification Number DL/State ID

Primary Phone * Primary Email *

Share Status *

Note:

By selecting 'Yes' to share your status, TCT Charge Texas allows your HR service providers to share your Personal Health Information with each other, saving you both time and paperwork. For most clients, you will only need to provide your information once and will not have to complete multiple applications at each organization you access for services. This allows providers to coordinate services and referrals more easily for and with you.

By selecting 'No' to share your status, you will need to complete an application and verify your eligibility documents for each program and at each organization you access for services. This will increase the time it takes to process your application and the amount of paperwork you will be required to submit each time you visit a new provider.

Share Status *

Create Client

Client Details

First Name * Middle Name Last Name *

Client ID Mother's Maiden Name

Gender * Date of Birth *

Social Security Number Individual Taxpayer Identification Number

DL/State ID Primary Phone * Primary Email *

Share Status * Is Client Active? Client Status Type *

Note:

By selecting 'Yes' to share your status, TCT Charge Texas allows your HR service providers to share your Personal Health Information with each other, saving you both time and paperwork. For most clients, you will only need to provide your information once and will not have to complete multiple applications at each organization you access for services. This allows providers to coordinate services and referrals more easily for and with you.

By selecting 'No' to share your status, you will need to complete an application and verify your eligibility documents for each program and at each organization you access for services. This will increase the time it takes to process your application and the amount of paperwork you will be required to submit each time you visit a new provider.

Share Status * Is Client Active? Client Status Type *

Save

Search Results

HRAR Client ID	Client Name	SSN/ITIN	Date of Birth	Status	ARIES ID	TAMI Client ID	AIDN
400249	Noriega, Te	***** ***-**-7686	01/6/2002	InActive			
400412	somoye, test	***** ***-**-3867	01/01/1982	Active			Test78798A
405016	Rivas, Test	***** ***-**-2547	06/28/1995	Active			

TCT Users will have the ability to view the Social Security Number (SSN) as masked on Client Search, New Client, and Edit Profile screens, so that client data security and client privacy is intact.

THMP Admins and ADAP Order Processors can view and edit Open (Started) and Open (Empty) orders that were created by another user for all pharmacies

TCT Users will be able to identify the creator of an order on the Order Dashboard so that they are unable to make updates to another user's order unless necessary.

TCT users will be able to view the system selecting the latest eligibility record regardless of Eligibility Status when merging clients with the same THMP or CARE subprograms, so that the new Client ID will reflect the latest eligibility record.

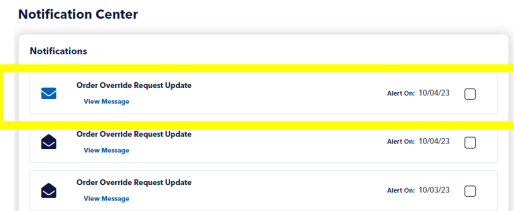
Feature Updates: Sprint 9

Notification for Order Override Denials for Pharmacist

From: HRAR.Services@hhs.texas.gov <HRAR.Services@hhs.texas.gov>
Sent: Friday, October 6, 2023 4:48 PM
To: [REDACTED]
Subject: Order Override Request Update

There is an update to the medication you ordered for your client for Order ID 2469. Your Order ID 2469 has been denied for the below medication. Please login to <https://sit1.ap.dshs.texas.gov> to view the further details.

•ACYCLOVIR(Acyclovir)



Order of ACYCLOVIR OS(Acyclovir) medication for client 426386 was denied in Order ID 42457.

Close

The following scenarios will trigger a notification (both in the Notification screen and an email notification) to be created for the User who submitted the override request:

- A THMP Admin or ADAP Order Processor clicks on Deny on the Order Overrides screen.
- Upon the above action, the notification (both in the Notification screen and an email notification) will be triggered in real time.

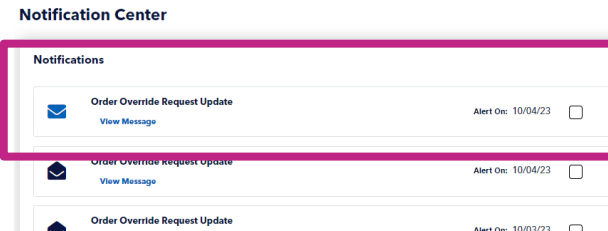
TCT users will be able to receive notifications for medication orders that they submitted, which have been denied in the order override request process, so that they can track orders efficiently.

Notification for Order Override Approvals for Pharmacist

From: HRAR.Services@hhs.texas.gov <HRAR.Services@hhs.texas.gov>
Sent: Monday, October 9, 2023 2:58 PM
To: [REDACTED]
Subject: Order Override Request Update

There is an update to the medication you ordered for your client for Order ID 42541. Your Order ID 42541 has been approved for the below medications. Please login to <https://uatap.tct.dshs.texas.gov/> to view the further details.

•ACYCLOVIR (100/btl)(Acyclovir)



Order of EVOTAZ (30/btl)(Evotaz (atazanavir/cobicistat)) medication for client 426388 was approved in Order ID 42491.

Close

The following scenarios will trigger a notification (both in the Notification screen and an email notification) to be created for the User who submitted the override request:

- A THMP Admin or ADAP Order Processor clicks on Deny on the Order Overrides screen.
- Upon the above action, the notification (both in the Notification screen and an email notification) will be triggered in real time.

Update: TCT User will be able to receive notifications for medication orders that they submitted, which have been approved in the order override request process, so that they can track orders efficiently.

Feature Updates: Sprint 9

Pharmacy Notes on Pharmacy Details Screen

This section will be accessible for view and edits to the following user roles: HRAR Admin, ADAP Data ManAdmin, ADAP Order Processor

Pharmacy Notes

Add a Note

Select Note Category

Select

Note

You have 8000 characters remaining.

Add a Note

Select Note Category

Select

Other

Pharmacy Details

Shipping / Mailing / Copay Address

Site Usage Designation

All Notes

Note Category

Select

User

Select an Option

Filter

Notes

No notes found.

Showing rows 0 to 0 of 0

Save

All Notes

Note Category

Select

User

Select an Option

Filter

Notes

admin, admin - Site Usage Designation - 10/9/2023, 10:54 PM

This is a test.

Showing rows 1 to 1 of 1

Save

Pharmacy Details

If you are creating a new pharmacy, make sure you do a search first before you create one to avoid creating a duplicate.

Pharmacy Name *

Pharmacy ID *

Pharmacy Address *

Pharmacy Phone *

Medical ID *

Contract

License Ref. Num. B.P.N.

05217294000

Secondary Phone

05217294000

Vendor ID *

1270296810002

Fee

004613210002

Contract Effective Begin Date

10/01/2023

Contract Effective End Date

10/01/2023

Approved Date

11/08/2018

Disputed Date

10/01/2023

Max Claim Holdback?

No Yes

Max Claim Holdback

Site Usage Designation *

Primary Participating Pharmacy

Site Usage Information

Adding Pharmacy Notes

This section will be accessible for view and edits to the following user roles:

- HRAR Admin
- ADAP Data ManAdmin
- ADAP Order Processor

All Users on the Role to Screen Mapping screen with Read access to the Pharmacy Details screen will only be able to view the notes, not filter and search the notes. All Users on the Role to Screen Mapping screen with Read/Write access to the Pharmacy Details screen will be able to view the notes and filter and search the notes.

Once a note has been added, the notes will display in a table format beneath the fields above in a section titled 'All Notes'.

TCT Users will be able to add notes on the Pharmacy Details page, so that they can add any pertinent information as needed.

Feature Updates: Sprint 9

HAB Report - Multiple Agency Selection

Users can now select multiple agencies in this field however, if 4800 - Texas Department of State Health Services is selected, users will not be able to select any other agency.

The image shows two side-by-side screenshots of the 'HAB QM Measures Report' filters. Both screenshots have a 'Reporting Period End Date' field set to '10/10/2023'. Below this is a radio button group for 'Are you running this report for ADAP measures?' with 'No' selected. The main field is 'Agency or Agencies'. In the left screenshot, it contains '4800 - Texas Department of State Health Services'. In the right screenshot, it contains a list of agencies: '4801 - Pathologic AIDS Support Organization', '4804 - Ryan's Hope', and '4806 - Central Health Program'. Below the agency field are four more fields: 'Funding Source(s)', 'Contract(s)', 'Service(s)', and 'Specialty', each with a 'Select' button.

When a user selects multiple agencies in the 'Agency or Agencies' search field, the following fields will function as follows:

- **Funding Source(s)**
 - All funding sources associated with the agencies selected will display for selection
- **Contract(s)**
 - All contracts associated with the agencies selected will display for selection
- **Service(s)**
 - All services associated with the agencies selected will display for selection

TCT Users will now have the ability to select multiple agencies on the HAB report, so that it is easier to compare data across agencies.

Addition of TX Department of State Health Services on the HAB Report

Rename 'Agency or Administrative Agency' search field as 'Agency or Agencies'

Rename 'Funding Source' search field as 'Funding Source(s)'

When a User selects '4800 - Texas Department of State Health Services' in the 'Agency or Agencies' field, this will display all funding sources in TCT Portal as well the option to select 'All'

Rename 'Contract' search field as 'Contract(s)'

This field will be disabled only when '4800 - Texas Department of State Health Services' is selected.

Rename 'Primary Service' search field as 'Services(s)'

When a User selects '4800 - Texas Department of State Health Services' in the 'Agency or Agencies' field, this will display all services in TCT Portal as well the option to select 'All'

The image shows a screenshot of the 'HAB QM Measures Report' filters. The 'Reporting Period End Date' is '10/10/2023'. The 'Agency or Agencies' field is set to '4800 - Texas Department of State Health Services'. Below this, the 'Funding Source(s)' field is populated with 'All Special Needs (R)', 'Broadway Carroll County Flight AIDS', and 'General Funds'. The 'Contract(s)' field is set to 'Select'. The 'Service(s)' field is populated with 'AIDS Pharmacological Assistance' and 'Child Care Services'.

TCT users will be able to generate the HAB report for the entire state of Texas, so that they can assess the overall performance measures for the state.

Feature Updates: Sprint 9

Generating Pharmacy Copy Letters Based on Latest Transaction

The following pharmacy copy letters will be impacted with this feature:

- Client/Pharmacy Update Letter Pharmacy Copy
- New Client Letter Pharmacy Copy
- Client/Pharmacy Update Letter Pharmacy Copy (Secondary Sites)
- New Client Letter Pharmacy Copy (Secondary Sites)



TEXAS

Health and Human Services

Texas Department of State Health Services

Jennifer A. Shuford, M.D., M.P.H.

Commissioner

October 6, 2023

four four
123 Main St
San Antonio, TX 34252

Date of Birth: 07/31/1991
Telephone: 324-444-4444

Your **Approved Medications and/or Pharmacy** with the THMP has been **Updated**. You are approved for the following medication(s) through the THMP (generics will be dispensed when available). You should order your medications through your assigned pharmacy using your Take Charge Texas (TCT) ID: **426410**

Your current approved medications are:

Generic Name	Trade Name
Atovaquone OS	MEPRON OS (210ml/btl)
*Evotaz (atazanavir/cobicistat)	*EVOTAZ (30/btl)

* This medication requires a secondary site be assigned

Your current pharmacy is:

Primary Pharmacy:
testerUAT
123 Main St
Dallas, TX 45656
324-444-4444

Sus **Medicamentos Aprobados y/o farmacia** con el THMP se han **Actualizado**. Usted está aprobado para los siguientes medicamentos a través del THMP (los genéricos se dispensarán cuando estén disponibles). Debe ordenar sus medicamentos a través de su farmacia asignada, usando su identificación de Take Charge Texas (TCT): **426410**

Sus medicamentos aprobados actualmente son:

Nombre Genérico	Nombre Comercial
Atovaquone OS	MEPRON OS (210ml/btl)
*Evotaz (atazanavir/cobicistat)	*EVOTAZ (30/btl)

* Este medicamento requiere que se le asigne un sitio secundario

Su farmacia actual es:

Farmacia Primaria:
testerUAT
123 Main St
Dallas, TX 45656
324-444-4444

Client/Pharmacy Update Letter
Pharmacy Copy

TCT users will be able to view the Pharmacy Copy letters generation based on the latest transaction, so that multiple letters for one client don't print for a pharmacy within a single day, hence triggering only one letter to be generated for that pharmacy in one day.

Feature Updates: Sprint 9

Update Services Import XML Process to Include AIDN

The Services Import XML file will be updated to include the following fields:

- 'Agency Assigned ID Number (AIDN)'
 - Optional field; If an Agency Assigned ID Number is provided on the file, the Client ID will no longer be a required field
 - Otherwise, the Client ID will remain mandatory

When a Services Import XML file is uploaded into TCT and the Agency Assigned ID Number was provided on the file but the Client ID was not provided, the file will result in an exception and the following validation will display:

- 'When a client ID is not provided, the AIDN, Organization ID, First Name, Last Name, Date of Birth, and Gender must be provided in the file and result in an exact match with an existing client's data in TCT. An exact match was not found so the client's service records could not be updated in TCT.'

System will check the below data on the file and attempt to find an exact match on the data for an existing client in TCT: Agency Assigned ID Number (AIDN), Organization ID, First Name, Last Name, Date of Birth, Gender

An exact match must be made on all six data elements above in order to successfully update the client's services data in TCT

- If an exact match was found with a client in TCT, the client's services data will be successfully updated in TCT.
- If an exact match was found with more than one client in TCT, the file will result in an exception and the following validation will display:
 - The AIDN, Organization ID, First Name, Last Name, Date of Birth, and Gender provided in the file matched with multiple clients in TCT so the client's service records could not be updated in TCT.

Upload Success

Document Name	Imported By	Imported on
ServiceXML-ClientMatch_TCT_Y1.xml	admin, admin	10/12/2023 4:05:46 PM

Import ID	Client ID	AIDN	First Name	Last Name	Success	Failure Reason
902	423129	8band848274	sunia	testuser@id	Yes	N/A

Upload Failure

Document Name	Imported By	Imported on
ServiceXML-ClientMatch_TCT_Y1.xml	admin, admin	10/12/2023 5:00:23 PM

Import ID	Client ID	AIDN	First Name	Last Name	Success	Failure Reason
903	8band848274	sunia	testuser@id	test	No	Client: When a client ID is not provided, the AIDN, Organization ID, First Name, Last Name, Date of Birth, and Gender must be provided in the file and result in an exact match with an existing client's data in TCT. An exact match was not found so the client's medical records could not be updated in TCT.

TCT users will be able to view the Agency Assigned ID Number field when importing the Services Import XML file so that services information can be mapped to the applicable client in the TCT Portal without needing to provide the TCT Client ID.

Feature Updates: Sprint 9

Update Medical Import XML Process to Include AIDN

The Medical Import XML file will be updated to include the following fields:

- Agency Assigned ID Number (AIDN)
 - Optional field
 - If a value is provided in this field, the Organization ID is a required field.

When a Services Import XML file is uploaded into TCT and the Agency Assigned ID Number was provided on the file but the Client ID was not provided, the file will result in an exception and the following validation will display:

- 'When a client ID is not provided, the AIDN, Organization ID, First Name, Last Name, Date of Birth, and Gender must be provided in the file and result in an exact match with an existing client's data in TCT. An exact match was not found so the client's medical records could not be updated in TCT.'

System will check the below data on the file and attempt to find an exact match on the data for an existing client in TCT: Agency Assigned ID Number (AIDN), Organization ID, First Name, Last Name, Date of Birth, Gender

An exact match must be made on all six data elements above in order to successfully update the client's medical data in TCT

- If an exact match was found with a client in TCT, the client's medical data will be successfully updated in TCT.
- If an exact match was found with more than one client in TCT, the file will result in an exception and the following validation will display:
 - The AIDN, Organization ID, First Name, Last Name, Date of Birth, and Gender provided in the file matched with multiple clients in TCT so the client's medical records could not be updated in TCT.

Upload Success

Import ID	Client ID	AIDN	First Name	Last Name	Success	Failure Reason
902	423129	8band8348754	kurtia	testuser@tct.com	Yes	N/A

Upload Failure

Import ID	Client ID	AIDN	First Name	Last Name	Success	Failure Reason
902	8band8348754	kurtia	testuser@tct.com	No	Client: When a client ID is not provided, the AIDN, Organization ID, First Name, Last Name, Date of Birth, and Gender must be provided in the file and result in an exact match with an existing client's data in TCT. An exact match was not found so the client's medical records could not be updated in TCT.	

TCT users will be able view the Agency Assigned ID Number when importing the Medical Import XML file so that medical information can be mapped to the applicable client in the TCT Portal without needing to provide the TCT Client ID.