

Utah Ryan White Part B Program

ClientTrack

UDOH Admin User Guide



UTAH DEPARTMENT OF HEALTH

Division of Disease Control & Prevention

Bureau of Epidemiology

Ryan White Part B Program

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How to Set up Email Notifications

Terminology:

- Case Manager – Clinic 1A or UAF

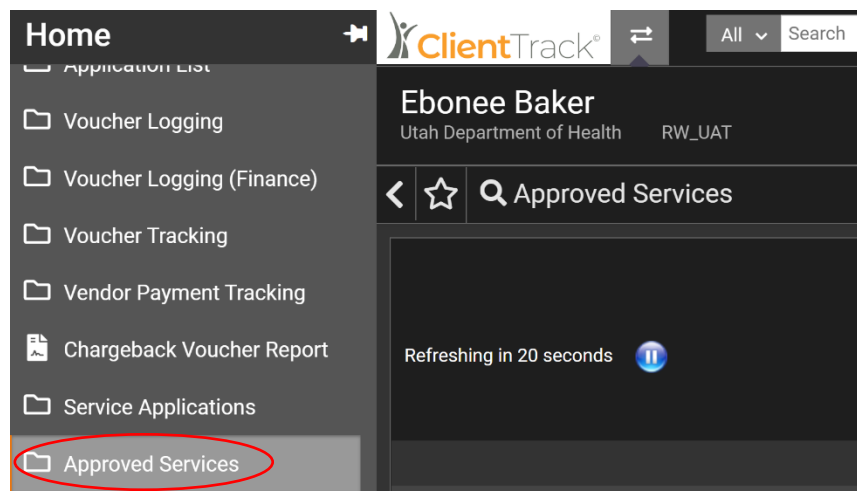
Requirements:

- For Oral Health, EFA, and Food request, the system will follow the Client's Program and ensure permission has been granted to text and/or email each person from the Client Contact Information.
- The assigned CM will be included as a recipient of the email.
- Emails do not need to be viewed before being sent. This process can run in the background. This will allow for bulk approvals.
 - Testing will be done to ensure emails are being properly sent and received.

User Steps:

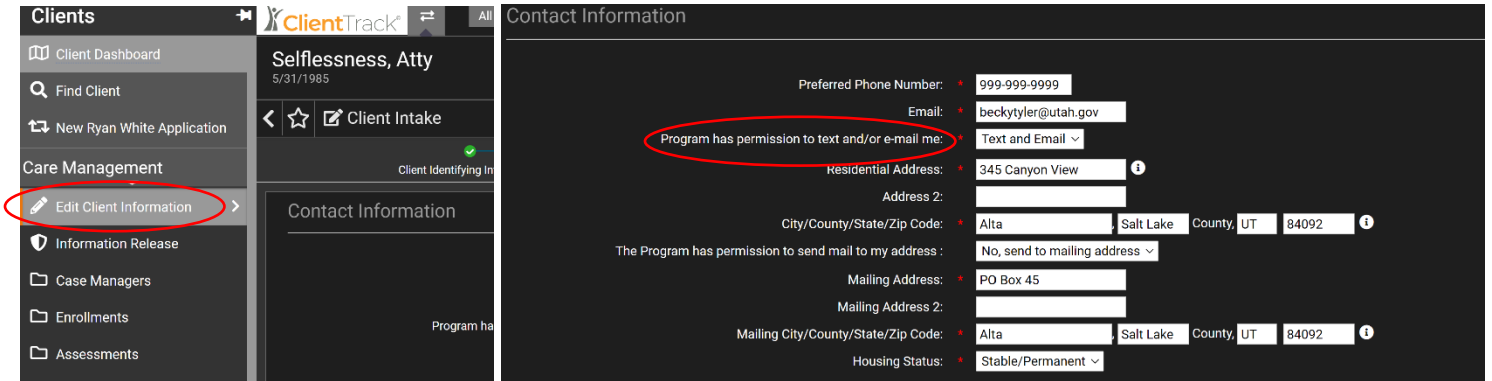
1. Select a New Service

In the Home Tab, select "Approved Services."



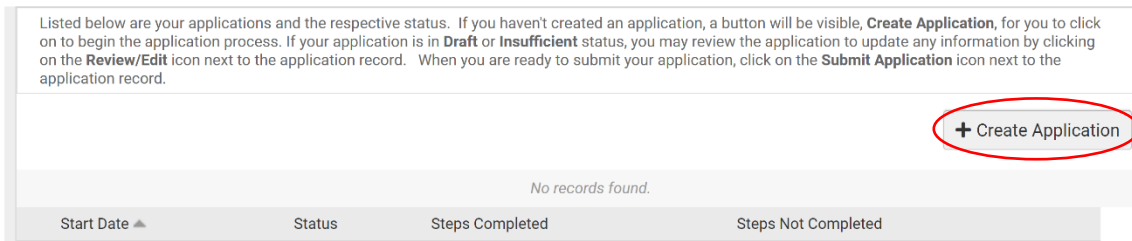
2. Service approvals or denials are decided by the CSS, and this will be depicted for clients in their personal Portal.
3. The system validates contact by email has been approved at the Client level (Program has permission to text and/or email).

- a. In the Client Tab, the CM can edit Client information and enable text and email notifications for the client.



- 4. If authorized, the system will then send a notification to the email on file for the client.
 - a. The CM email will be included in the recipient’s CC field of the email.
- 5. The email will include:
 - a. A notification there has been a decision made on their application – asking the client to check their portals for details.
 - b. The words are vague when discussing approvals or denials on purpose to ensure clients go in a check their portal.
- 6. Email and text notifications will also be shown on the portal when a client finishes a new application (as depicted below).

Applications



Contact Information

