*Amyvid Live Reader Training (LRT) File Load*

*Program Acknowledgment of Requirements*

*Performed by the Hibbert Group*

*THE HIBBERT GROUP CONFIDENTIAL*

*Revised 01/24/16*

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| A. General Project Information: | | | | |
| **Project Client:** | | *Lilly USA, LLC* | | |
| **Project Name:** | | *Amyvid Live Reader Training (LRT) File Load* | | |
| **Project Requestor:** | | *Jill Nolan* | | |
| **Document History** | | | | |
| **Version** | **Date** | | **Author** | **Reason for Change** |
| 000 | 12/27/2016 | | Frank D’Errico | Initial Document Creation |
| 001 | 01/04//2016 | | Frank D’Errico | Track changes per Sarah’s comments post review |
| 002 | 01/05/2016 | | Frank D’Errico | Update and Acceptance of changes + SFTP info added |
| 003 | 01/10/2016 | | Frank D’Errico | Add Opt in Flag and Email Updates |
| 004 | 01/12/2016 | | Frank D’Errico | Email flow in 1.4.2.3.3 updated |
| 005 | 01/24/2017 | | Frank D’Errico | Added email Site flow for Change Password, Approved Specialties for Amyvid, and error validations on load for required fields |

| B. Project Contacts: | | | | |
| --- | --- | --- | --- | --- |
| **Client: (List each person who will use the deliverables produced by the project)** | | | | |
| **Title** | **Name** | **Department** | **Telephone** | **E-mail** |
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| **THG Contacts: (List key project stakeholders who have a key interest in the project)** | | | | |
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| C. Project Definition: | |
| --- | --- |
| **Objectives:**  (Describe the business need, opportunity or problem that the project will address.) | *New File load for Amyvid Live Reader Training records* |
| **Scope Statement:**  (Provide a summary of the scope of work to be delivered.) | *Hibbert will utilize this file load to update and create profiles for Live Reader Training attendees on the Amyvid ORT site. All data will be mapped to ORT database. The load will also create a Welcome Notification email containing site credentials; a completion certificate will also be included for the individuals who have completed the Live Reader Training.* |
| **Deliverables:**  (Identify a high level list of key deliverables that need to be done in order to reach the objectives. Deliverables should be measurable.) |  |

| D. Business Requirements: |
| --- |

1. **Create new Live Reader Training (LRT) file load process that will map to ORT database**
   1. File is Pipe Delimited – file layout included in requirement 3.0.
      1. If the same email address is received more than once within a LRT batch file, the last record received on the file, will be loaded.
   2. Hibbert will receive a one-time historical data file for LRT records received prior to 2017
      1. ASSUMPTION: Phase 1 certificate email with user credentials (Transactional Certificate Email) will NOT be sent at time of load. Expectation is that any records received on the historical data file will be from prior to 2017, therefore certificates are presumed to have already been sent via existing Avant LRT process
         1. (1) Email blast will be sent following Phase 2 MTP: Users must have Opt-in Flag of Y to receive promotional email blast
   3. Hibbert expects to receive ongoing weekly batch files including attendees that have completed LRT the previous week
      1. (2) Transactional emails will be sent depending upon Completion Flag and if user exists in ORT Database
         1. (2) Transactional emails will swapped out with different verbiage at time of Phase 2 MTP
      2. (1) Email blast will be sent following Phase 2 MTP
         1. Users must have Opt-In Flag of Y to receive promotional email blast
   4. File will either update or create new user profile in database based on Email address
      1. If email address does ***NOT*** currently exist in the DB, the record will be appended to the database and a profile will be created for the user regardless of completion flag value
         1. **If Completion Flag is Y** (and record does not currently exist in ORT) Overall Module Training, Modules 1 – 3, will be marked as complete within UI
            1. User will also be marked as complete for Live Reader Training in Admin Portal
            2. User will NOT be marked as complete for ORT in Admin Portal

Load will trigger transactional Email B with a certificate of completion (either attached or retrievable by download link) and verbiage thanking the HCP for attending the training

Email will contain user credentials (user email) with a temporary password and link to log in page

Upon signing in user will be taken to Change/Update Password modal (page in Phase 2)

Once complete user will be taken to confirm information on Change Profile Information modal; Specialty will need to be selected from drop down if not populated from Amyvid Approved Specialties

Transactional Certificate Email B will be swapped out in Phase 2 with updated verbiage

* + - 1. **If Completion Flag is N** (and record does not currently exist in ORT), Overall Module Training, Modules 1 – 3, will NOT be marked as complete within UI
         1. User will NOT be marked as complete for Live Reader Training in Admin Portal
         2. User will NOT be marked as complete for ORT in Admin Portal

Load will trigger transactional Email A asking the user to come back and continue training in order to receive their certificate

Email A will contain user credentials (user email) with a temporary password and link to log in page

Upon signing in user will be taken to Change/Update Password modal (page in Phase 2)

Once complete user will be taken to confirm information on Change Profile Information modal; Specialty will need to be selected from drop down if not populated from Amyvid Approved Specialties

Transactional Email A will be swapped out in Phase 2 with updated verbiage

* + 1. If email address already exists in the DB and is received on the LRT file, the record will be updated per the record on the LRT file, within the ORT database/site
       1. **If Completion Flag is Y** (user exists in ORT), and the user **has** **not yet completed** the ORT training, the user will be marked as complete for Overall Module training (Modules 1 – 3)
          1. User will also be marked as complete for Live Reader Training in Admin Portal
          2. User will NOT be marked as complete for ORT in Admin Portal

Load will trigger transactional Email B with a certificate of completion (either attached or retrievable by download link) and verbiage thanking the HCP for attending the training

Email will contain user credentials (user email) with temporary password for ORT and link to log in page

Upon signing in user will be taken to Change/Update Password modal (page in Phase 2)

Once complete user will be taken to confirm information on Change Profile Information modal; Specialty will need to be selected from drop down if not populated from Amyvid Approved Specialties

Transactional Certificate Email B will be swapped out in Phase 2 with updated verbiage

Variable fields on Certificate (First Name, Middle Initial, Last Name and Completion Date will use latest iteration of record update in database

* + - 1. **If Completion Flag is Y** (user exists in ORT), and the user **has already completed** ORT training, the user will be marked as complete for LRT
         1. User should already be marked as completed for overall Module Training (Modules 1 – 3)
         2. User will be marked as complete for Live Reader Training in Admin Portal
         3. User is already marked as complete for ORT in Admin Portal

Load will trigger transactional Email B with a certificate of completion (either attached or retrievable by download link) and verbiage thanking the HCP for attending the training

Email will contain user credentials (user email) with temporary password for ORT and link to log in page

Upon signing in user will be taken to Change/Update Password modal (page in Phase 2)

Once complete user will be taken to confirm information on Change Profile Information modal; Specialty will need to be selected from drop down if not populated from Amyvid Approved Specialties

Transactional Certificate Email B will be swapped out in Phase 2 with updated verbiage

Variable fields on Certificate (First Name, Middle Initial, Last Name and Completion Date will use latest iteration of record update in database

* + - 1. **If Completion Flag is N** (user exists in ORT), and the user has **not yet completed** the ORT training, Modules 1 – 3 will NOT be marked as complete within UI
         1. User will NOT be marked as complete for Live Reader Training in Admin Portal
         2. User will NOT be marked as complete for ORT in Admin Portal
         3. Load will trigger transactional Email A asking the user to come back and continue training in order to receive their certificate

Email A will contain user credentials (user email) with temporary password and link to log in page

Upon signing in user will be taken to Change/Update Password modal (page in Phase 2)

Once complete user will be taken to confirm information on Change Profile Information modal; Specialty will need to be selected from drop down if not populated from Amyvid Approved Specialties

Transactional Email A will swapped out in Phase 2 with updated verbiage

* + - 1. **If Completion Flag is N** (user exists in ORT), and the user **has already completed** ORT training
         1. User should already be marked as completed for overall Module Training (Modules 1 – 3)
         2. User is already marked as complete for ORT in Admin Portal
         3. User will NOT be marked as complete for Live Reader Training in Admin Portal
         4. Load will NOT trigger any Transactional email
  1. Error Validation
     1. Load will trigger external email notification including any records that are missing ‘@’ or ‘.com’ in email field and fail the standard email validation
     2. Error validation will also error out records that are missing any required fields – those fields will be identified specifically on email if value is null
        1. Email notification should be sent to Avant stakeholders: ReaderTraining@avanthc.com. It is Avant’s responsibility to notify Hibbert of an error received on the LRT file and communicate when an updated file will be received
           1. If a record(s) has failed, Hibbert expects to receive a secondary file from AVANT containing the updated record(s) with a corrected email address to load within 24 hours.
     3. Load will also trigger internal email notification including any records that are missing ‘@’ or ‘.com’ in email field and fail the standard email validation
        1. Email notification should be sent to [Amyvid@hibbertgroup.com](mailto:Amyvid@hibbertgroup.com)

1. **Create script for LRT file transfer** 
   1. File will be dropped to Hibbert SFTP weekly from Avant to /hglilrsh/Amyvid/LRT
      1. Host: ftp.hibbertgroup.com
      2. Username: hglilrsh
      3. Password: H61!1r5h
   2. File Name: LRT\_YYYYMMDD.txt
   3. Script will run M – F; at 8AM and 3PM and archived once processed
   4. File will be pipe delimited
2. **File Layout and Field Mapping:**

| **File Layout** | | | | | |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Data** | **Description** | **Data Required** | **Data Type** | **Sample Data** | **Comment** |
|  | Email Address | Attendee’s Email Address | Yes | Alpha/Numeric | SSample@gmail.com | \*\*Will be used as unique identifier to create user profile and map to existing users for updates  Max length = TBD chars Special characters are acceptable (Hibbert will perform standard email validation; @ and .com) |
|  | First Name | Attendee’s First Name | Yes | Alpha/Numeric | Sammy | Max length = TBD chars |
|  | Last Name | Attendee’s Last Name | Yes | Alpha/Numeric | Sample | Max length = TBD chars |
|  | Date Attended | Date Live Reader Training was Attended | Yes | Alpha/Numeric | 12012016 | MMDDYYYY |
|  | Completion Flag | Did Attendee Complete Training | Yes | Alpha/Numeric | Y  N | Y or N to determine if user completed live training  If flagged as N, the assumption is that the user did NOT complete LRT; the user will still receive an email, however, that email will not include certificate of completion. User will not be marked as complete within UI for overall module completion or LRT completion.  If flagged as Y, the assumption is that the user completed LRT; the user will receive email with certificate of completion. Modules 1 – 3 will be marked as complete within UI. Marked as complete for LRT as well. |
|  | SLN | Attendee’s State License # | No | Alpha/Numeric | MD123456 | Used as secondary HCP/user identifier. Will not be available for Office Managers, etc |
|  | Specialty | Attendee’s specialty | No | Alpha/Numeric | RADIOLOGY | Max length = TBD chars |
|  | Degree | Attendee’s degree | No | Alpha/Numeric | MD | Max length = TBD chars |
|  | Address 1 | Attendee’s address | Yes | Alpha/Numeric | 123 Anywhere St | Included on Sign-In sheet  Max length = TBD chars |
|  | Address 2 | Attendee’s address | No | Alpha/Numeric | Apt 1 | Included on Sign-In sheet  Max length = TBD chars |
|  | City | Attendee’s address | Yes | Alpha/Numeric | Hometown | Included on Sign-In sheet  Max length = TBD chars |
|  | State | Attendee’s address | Yes | Alpha/Numeric | NJ | Included on Sign-In sheet  Max length = TBD chars |
|  | Zip Code | Attendee’s address | Yes | Alpha/Numeric | 08690 | Included on Sign-In sheet  Max length = TBD chars |
| 1. OP | Opt-in Flag | Does Attendee want to receive Promotional Communications | Yes | Alpha/Numeric | Y  N | Y or N to determine if user would like to receive promotional communications |

| E. Operational Review: | |
| --- | --- |
| **Communication Interfaces:**  (Describe the requirements associated with any communication functions required by this program) |  |
| **Performance Requirements :**  (Describe the performance requirements for the program) | N/A |
| **Security Requirements :**  (Specify any requirements regarding security or privacy issues surrounding the program or protection of the data used or created by the program) |  |

| F. Pricing & Invoicing: | |
| --- | --- |
| **Invoicing:**  (How the client will be billed, i.e. monthly invoice) | See estimate. |
| **Pricing:**  (Include/attach any estimates) |  |
| **Revised Pricing Notes:**  (If any changes or revisions to estimate and/or pricing) |  |

| G. Approvals: | | | |
| --- | --- | --- | --- |
| This Program Acknowledgement is valid only if signed by both parties (Client & Hibbert) as indicated below. Each party represents that the individual signing on its behalf has read and understood the document, and has full authority to bind such party. | | | |
| **For Client:** | | | |
| **Title** | **Name** | **Signature** | **Date**  **(MM/DD/YYYY)** |
|  |  |  |  |
| **For Hibbert:** | | | |
| **Title** | **Name** | **Signature** | **Date**  **(MM/DD/YYYY)** |
|  |  |  |  |

| Revision Acknowledgements: | | | |
| --- | --- | --- | --- |
| **Date**  **(MM/DD/YYYY)** | **Section(s) Updated** | **Revised Pricing (Y/N)** | **Client Initials** |
|  |  |  |  |
|  |  |  |  |

1.1 Amyvid Live Reader Training (LRT) File Load Tables

1. SS\_PERSON\_CAMPAIGN\_PROFILE
2. SS\_ADDRESS
3. SS\_IMG\_CTR
4. SS\_IMG\_CTR\_CONTACT
5. SS\_IMG\_CTR\_SPECIALITY
6. SS\_LRT\_USER
7. SS\_MODULE
8. SS\_PERSON

1.2 Amyvid Live Reader Training (LRT)VS (ORT) users

1. Refer Table “**SS\_LRT\_USER”**
2. For LRT “**COMPLTION\_FLAG**” value is **“Y”**
3. For ORT “**COMPLTION\_FLAG**” value is **“N”**

Email Address|First Name |Last Name|Date Attended|Completion Flag|SLN|Specialty |Degree|Address 1|Address 2|City|State|Zip Code|Opt-in Flag

acherukuri@hibbertgroup.com|Ajay|Cherukuri|06062017|Y|NJ441314|RADIOLOGY|NJ|1234 Test St.||Test City|NJ|12345|Y

akandala@hibbertgroup.com|Ananth|Kandala|06062017|Y|NJ12345|CLINCAL GENETICS|NJ|1234 TEST Test St.||Test City|NJ|12345|Y

derricf@hibbertgroup.com|Frank|ddd|06062017|Y|NJ12345|PODIATRY|NJ|1234 TEST Test St.||Test City|NJ|12345|Y

hkande@hibbertgroup.com|Krishna|hari|06062017|N|MA12345|PHYSICAL THERAPY|NJ|1234 TEST Test St.||Test City|MA|12345|Y

pdevasani@hibbertgroup.com|devasani|prathibha|06062017|Y|MA12345|PHYSICAL THERAPY|NJ|1234 TEST Test St.||Test City|MA|12345|Y

|  |  |  |  |
| --- | --- | --- | --- |
| **Sr No** | **LTR File Field** | **Table** | **Table Column** |
|  | * Email Address * First Name * Last Name * Specialty * Degree | SS\_PERSON | * EMAIL\_ADDRESS * FIRST * LAST * SPECIALTY * DEGREE |
|  | * Completion Flag * Date Attended * SLN * Opt-in Flag | SS\_LRT\_USER | * COMPLTION\_FLAG * DATE\_ATTENDED * SLN * OPT\_FLAG |
|  | * Address 1 * Address 2 * City * State * Zip Code | SS\_ADDRESS | * ADDRESS1 * ADDRESS2 * CITY * STATE\_CODE * ZIP\_CODE |