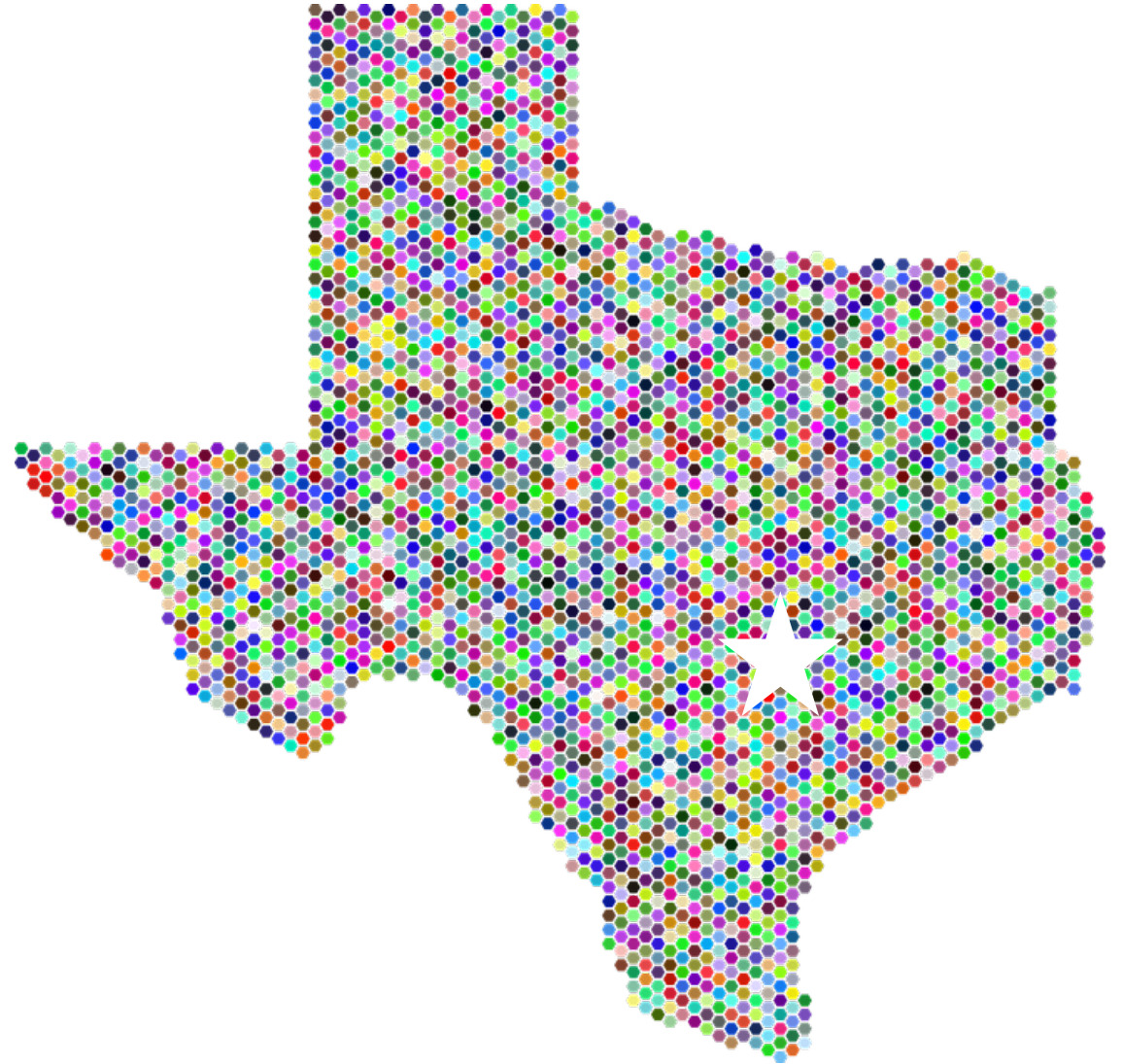


Take Charge Texas (TCT) User Engagement Session

January 25th, 2024



Meet the Facilitators

DSHS/HHSC TEAM



Charletha Joseph
Program Support



Rachel Sanor
HIV Care and
Medications Unit
Director



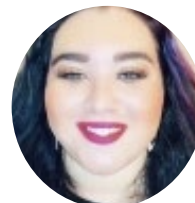
Christine Salinas
ADAP Regional
Manager



Janina Vazquez
HIV Care Services
Group Manager



Holly Benavides
TCT Help Desk Program
Specialist



Ethel Garcia
Medication Data and Analysis
Group Manager



Sylvia Jimenez
THMP 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:

PolIEV.com/tctdshsstaff

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

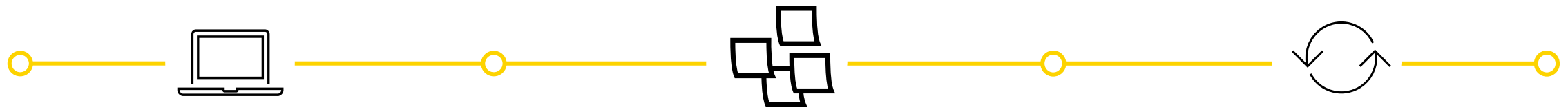
PolIEV.com/tctnondshsstaff

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.



SPRINT 8

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

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

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 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.



SPRINT 11

Focused 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, curated pharmacy report for overrides. Furthermore, established SFTP process for Medical and Services Import through Global Scape.



SPRINT 12

Focused on enhancing the medication resubmission process as well as updating the verbiage within the HOPWA contracts. Furthermore, provided the capability for Admins to view the FPL and RSR Client by Zip Code Reports, and enhancements to allow System denial on expired Eligibility periods.

User Stories

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
- SFTP Process: Service Records Updates
- SFTP Process: Service Records – Successful Client Update Email
- SFTP Process: Service Records – Failed Client Update Email
- SFTP Process: Medical Records Updates
- SFTP Process: Medical Records – Successful Client Update Email
- SFTP Process: Medical Records – Failed Client Update Email

Sprint 11

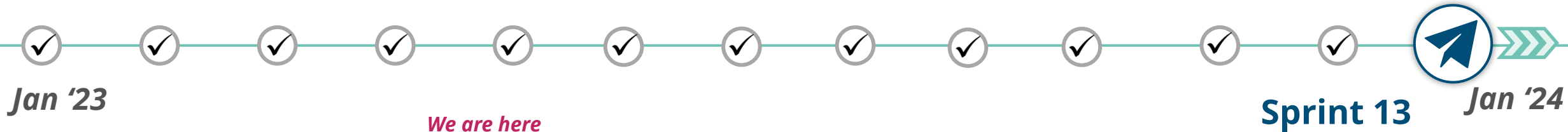
- Document Start and End Date Enhancements
- Standardize Login Error Messages in Agency Portal
- FPL: Overriding System Derived Household FPL for CARE Clients
- Enhancements to Comments Provided When Overriding or Ending Eligibility
- TCT Client Portal – Instructional Text Updates
- Order Override Accessibility 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

Sprint 12

- Banner Message Configuration for Portal Downtime
- Pharmacy Report: Medication Resubmitted
- Shipment Resubmission Overrides Denial Notification
- Shipment Resubmission Overrides Approval Notification
- Resubmission of Medications Enhancement
- Update Primary, Secondary, and Subservice Names for HOPWA Contracts
- RSR Client by Zip Code Report
- FPL: RSR CARE System-Derived FPL Report

Project Plan: In Progress Features

The graphic below represents the features & user stories our team is currently consuming for Sprint 13.



We are here

Focusing on enhancing the Task Board, search capabilities post Client merge, and application workflow in the Client Portal. Additionally, providing enhanced features for Staff Audit Report and WICY Report, while introducing the Worker Performance Report and Unsubmitted Client Application Report for seamless workflow process.

- Client Services Detail Record Enhancements
 - Task Board Assignment Enhancement
 - Staff Audit Report: Search by Username
 - Save & Exit Applications in Client Portal
 - Unsubmitted Client Application Report
- Worker Performance Report: Applications Processed
 - WICY Report
- Ability to Search with Prior Client IDs Post Client Merge
 - IAMOnline API Development: Client Portal
- IAMOnline: Date of Birth & Driver's License Data Collection in Client Portal
 - IAMOnline Provisioning API Development
 - IAMOnline Authentication API Development
 - Real Time Order Status Updates from PIMS
 - Real Time Order Submission to PIMS
- Error Handling: Real Time Order Submission to PIMS

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:
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.



System Overview: **New** TCT Features



Live Demonstration of TCT Features

TCT Features Video Presentation

[RSR Client by Zip Code Report](#)

[FPL: RSR Care System-Derived FPL Report](#)

[Pharmacy Report: Medication Resubmitted](#)

[Resubmission of Medications Enhancement](#)

[Banner Message Configuration for Portal Downtime](#)

[Shipment Resubmission Overrides Denial Notification &](#)

[Shipment Resubmission Overrides Approval Notification](#)

[Update Primary, Secondary and Subservice Names for HOPWA](#)

[Contract](#)



Gathering Your Feedback



Poll Everywhere

Poll Everywhere

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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.

Thank You!

System Overview: **New** TCT Features



Feature Updates: Sprint 12

Banner Message Configuration for Portal Downtime

In the Admins tile:

The 'Pharmacy Banner' tab is updated to 'TCT Banners'

There is a new link in the TCT Banners tab above the Pharmacy Banner link titled 'TCT Agency Portal Banner'.

There is a new link in the TCT Banners tab under the TCT Agency Portal Banner link titled 'TCT Client Portal Banner'.

On the TCT Agency Portal Banner and TCT Client Portal Banner screens, only TCT Admins will be able to add / edit a message which will be displayed.

The added TCT Agency Portal Banner or TCT Client Portal Banner message will be displayed on the home dashboard page of the Agency or Client Portal (once logged in).

When there is a maintenance activity scheduled for the portal, the below message will be displayed on the login page of the Agency and Client Portal (before a User logs in). The date and times of the downtime will be updated accordingly as maintenance activities are scheduled.

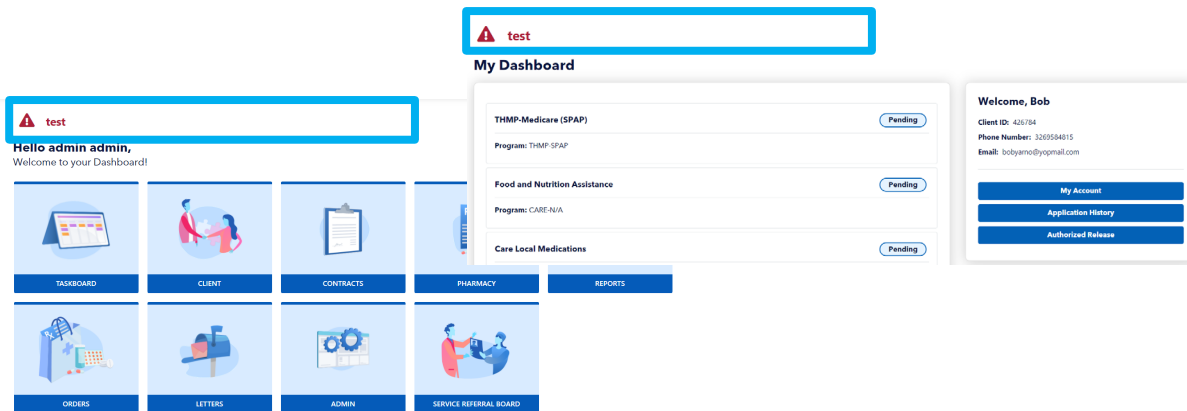
- TCT Maintenance - Notice for System Outage (MM-DD-YYYY): TCT will go offline for System Maintenance activity from Day of the Week, Month Date XX AM / PM Central Time, through Day of the Week, Month Date XX AM / PM Central Time. Please do not attempt to log in during the maintenance duration. Thank you!

The added TCT Agency Portal Banner message will be displayed on

- Home dashboard page of Agency Portal (once logged in)

The added TCT Client Portal Banner message will be displayed on

- Home dashboard page of the Client of Client Portal (once logged in)



TCT Admin will be able to configure banner messages that will display throughout the agency and client portal, so that they can provide TCT users with a warning that they will not be able to access the system during a select period when deployments occur.

Feature Updates: Sprint 12

Banner Message Configuration for Portal Downtime Continued

On the TCT Client Portal Banner or TCT Agency Portal Banner screen, an Admin has the ability to add message.

Add Message

Message *

You have 1000 characters remaining.

Start Date * End Date *

MM/DD/YYYY MM/DD/YYYY

Start Time * End Time *

Select Select

Save **Cancel**

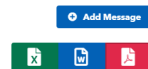
When an Admin adds a TCT Portal Banner Message and saves it, there will be confirmation message in a green banner which indicates

- TCT Portal Banner message added successfully!



TCT Client Portal Banner

Messages added on this screen will be displayed on the home dashboard page of Client Portal when a User is logged in.



On the TCT Client Portal Banner and TCT Agency Portal Banner screen, under the Action column, User will the option to click on Edit button or End Message button. User will be able to edit the below

Start Date / Start Time - only when the start date or start time has not started

End Date / End Time - only when the end date or end time has not been reached

Message - can be edited as long as the end date or end time has not been reached

When a User clicks on End Message button, there will be a validation message which appears on the screen:

- Are you sure you want to end the banner?
- Once a User clicks on Confirm, there will be a confirmation message in a green banner which indicates:

Current TCT Agency Portal Banner message ended successfully! (TCT Agency Portal Banner screen)

Current TCT Client Portal Banner message ended successfully! (TCT Client Portal Banner screen)

- The End Date and End Time will be updated to reflect the date and time that the message was ended manually.

TCT Admin will be able to configure banner messages that will display throughout the agency and client portal, so that they can provide TCT users with a warning that they will not be able to access the system during a select period when deployments occur.

Feature Updates: Sprint 12

Banner Message Configuration for Portal Downtime Continued

Once the Admin has ended the message manually, the TCT Agency Portal Banner and TCT Client Portal Banner message will end, and will no longer be displayed on the Agency or Client Portal, regardless of what the End Date or End Time was initially indicated.



TCT Client Portal Banner

Messages added on this screen will be displayed on the home dashboard page of Client Portal when a User is logged in.

[Add Message](#)

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Message	Start Date	End Date	Start Time	End Time	Status	Actions
test	01/10/2024	01/10/2024	5:00:00 AM	11:35:32 AM	Inactive	Edit Message End Message

If a User tries to add a banner message which conflicts with another message time duration, the below validation message will be displayed:

- There is a message scheduled for the duration selected. Please update the timing to ensure this message does not conflict with the timing of another message.

The TCT Agency Portal Banner and TCT Client Portal Banner screen will have the capability to export in the following formats: Excel, Word, .pdf

There can only be one active message at one point in time in either TCT Agency Portal Banner and TCT Client Portal Banner.

TCT Admins will not have the ability to delete any added messages. Once a message has been added, the Admin can end the message, however, cannot delete the message off of the screen.

Once a banner has ended, the Edit Message and End Message buttons in the Action column will not be clickable.

TCT Client Portal Banner

Messages added on this screen will be displayed on the home dashboard page of Client Portal when a User is logged in.

[Add Message](#)

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Message	Start Date	End Date	Start Time	End Time	Status	Actions
test	01/10/2024	01/10/2024	5:00:00 AM	11:35:32 AM	Inactive	Edit Message End Message

TCT Admin will be able to configure banner messages that will display throughout the agency and client portal, so that they can provide TCT users with a warning that they will not be able to access the system during a select period when deployments occur.

Feature Updates: Sprint 12

Pharmacy Report: Medication Resubmitted

There will be a new report titled 'Medication Resubmitted Overrides Report' in the Reports tile, under the 'Order Overrides by Pharmacy Report'.

The following user roles will have access to the 'Medication Resubmitted Overrides Report':

- HRAR_Admin, ADAP DataManAdmin, ADAP Order Processor, THMP Staff, ADAP PSI, PSII, PSIII, TCT Pharmacist User

- The Pharmacist will only be able to look at their pharmacy code/name.

HRAR Admins will have the ability to update the roles that have access to the Medication Resubmitted Overrides Report through the Role to Screen Mapping feature.

The following search criteria will be available at the top of the report:

- Pharmacy, Submitter First Name, Submitter Last Name, Client ID, Medication Resubmitted Override Decision, Start Date, End Date

Above the results table on the Medication Resubmitted Overrides Report screen, the below fields will be displayed and populated based on the selection made on the Start and End Dates:

- Report Start Date, Report End Date

If no date selected, then both the above fields will populate as 'All Dates'

TCT Users will be able to view a report which consists of all the medications which have been resubmitted and have been approved or denied, hence being able to track those medications.

The following validation message will be displayed on the screen and will appear as a validation if the User clicks on Search without selecting any of the search criteria:

- 'Please select at least one search filter before proceeding.'

The results table of the Medication Resubmitted Overrides Report will have the following column headers:

- Client ID, Submitter Username, Pharmacy, Original Order ID, New Order ID, Medication Resubmitted Override Request Date, Medication Resubmitted Override Decision, Medication Resubmitted Override Decision Provided By, Medication Resubmitted Override Decision Date, Trade Name, Generic Name, Dosage Strength, Quantity, Override Reason

Client ID	Submitter User Name	Pharmacy	Original Order ID	New Order ID	Medication Resubmitted Override Request Date	Medication Resubmitted Override Decision	Medication Resubmitted Override Decision Provided By	Medication Resubmitted Override Decision Date	Trade Name	Generic Name	Dosage Strength	Quantity	Override Reason
426306	admin1.admin	Amex Pharmacy	42578	N/A	12/08/2023 12:24:14 PM	Denied	admin.admin	01/03/2024 12:45:02 PM	ZIDOVUDINE (100/bt)	Zidovudine (AZT)	100	1	fyghth
426306	admin1.admin	Amex Pharmacy	42578	N/A	12/08/2023 12:24:14 PM	Denied	admin.admin	01/03/2024 12:45:00 PM	ZIDOVUDINE OS (240 ml/bt)	Zidovudine OS (AZT)	10	1	fyghth
426496	Richards,Mary	Amex Pharmacy	42633	N/A	12/07/2023 4:49:20 PM	Denied	admin.admin	01/03/2024 12:45:10 PM	SMZ/TMP (100/bt)	SMZ/TMP	800/160	1	reason
426496	admin1.admin	Amex Pharmacy	42633	42667	12/06/2023 8:07:45 PM	Approved	admin.admin	01/03/2024 10:03:45 AM	ZIDOVUDINE (100/bt)	Zidovudine (AZT)	100	1	Order not received.

Feature Updates: Sprint 12

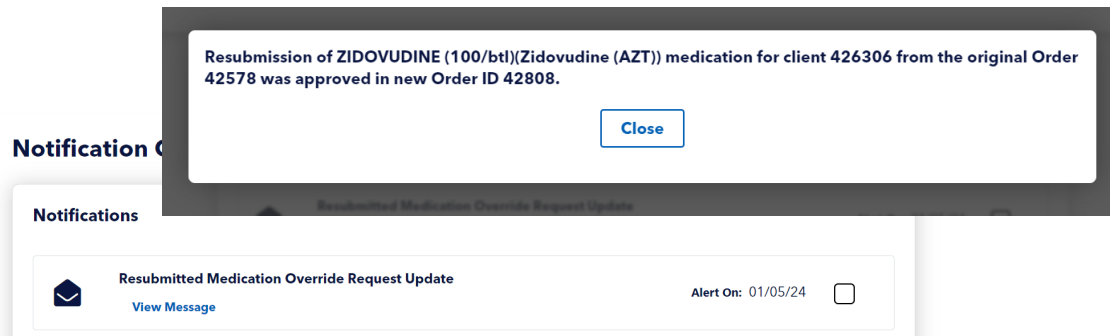
Shipment Resubmission Overrides Denial Notification

The following scenario will trigger a notification:

- A THMP Admin or ADAP Order Processor clicks on Deny on the Shipment Resubmission Overrides.
 - This will remove the denied drug record from the Shipment Resubmission Overrides screen.

Upon the above action, the notification (both in the Notification screen and an email notification) will be triggered in real time.

To view notifications, TCT Users can log in, and navigate to the Notifications screen, and view the message titled 'Resubmitted Medication Override Request Update'.



When the View Message button is clicked on, there will be a pop-up with the following text:

- 'Resubmission of XXX medication from original Order ID ### was denied for client YYY.'
- The text above will be updated based on the action taken by THMP Admin or ADAP Order Processor in the Agency Portal through the following:
 - The 'XXX' in the text above will be the Trade Name (Generic Name) of the medication ordered.
 - The 'YYY' in the text above will be the Client ID.
 - The '###' in the text above will be the original Order ID from which the resubmission of the medication was initiated from.

A notification will also be sent to the email address provided by the Pharmacy, upon any resubmission override denial. Only TCT Pharmacists will receive the email notification. The body of the email will state the following message:

- 'There is an update to the medication you resubmitted for your client in the original Order ID XXX. Your Order ID XXX has been denied for the below resubmitted medication(s). Please login to HRAR to view the further details.'
 - Trade Name A (Generic Name A)
- Both the first and second 'XXX' is the original Order ID from which the resubmission of the medication was initiated from.
 - It will be the same order ID for both 'XXX'.

TCT Users will be able to receive notifications for medication resubmission orders that they submitted, which have been denied in the Shipment Resubmission Override process, so that they can track orders efficiently.

Feature Updates: Sprint 12

Shipment Resubmission Overrides Approval Notification

The following scenarios will trigger a notification:

- A THMP Admin or ADAP Order Processor clicks on Approve on the Shipment Resubmission Overrides screen, selects the drug record for submission, and proceeds with clicking on the 'Submit Order' button.

Upon the above action, the notification (both in the Notification screen and an email notification) will be triggered in real time

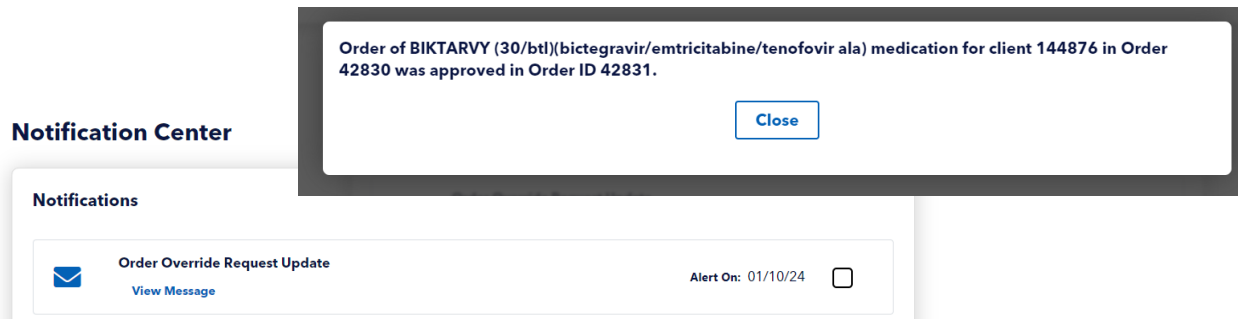
To view notifications, TCT Users can log in, and navigates to the Notifications screen, and view the message titled, 'Resubmitted Medication Override Request Update'

When the View Message button is clicked on, there will be a pop-up with the following text:

- 'Resubmission of XXX medication for client YYY from the original Order ### was approved in new Order ID ZZZ.'
- The text above will be updated based on the action taken by THMP Admin or ADAP Order Processor in the Agency Portal through the following
 - The 'XXX' in the text above will be the Trade Name (Generic Name) of the medication resubmitted.
 - The 'YYY' in the text above will be the Client ID.
 - The '###' in the text above will be the Order ID the pharmacy used to submit the override request.
 - The 'ZZZ' will be the new Order ID the resubmission override request was approved in.
 - This will appear on the client's Medication Order History under the Resubmitted Order ID column as documented in IH-3249: Client Medicine Order History Enhancements

A notification will also be sent to the email address provided by the Pharmacy email address, upon a resubmission override approval. Only TCT Pharmacists will receive the email notification. The body of the email will state the following message:

- There is an update to the medication you resubmitted for your client for the original Order ID ###. Your new Order ID XXX has been approved for the below resubmitted medications. Please login to HRAR to view the further details.
 - Trade Name A (Generic Name A)
- The '###' is the original Order ID from which the resubmission of the medication was initiated from.
- The 'XXX' is the Order ID the resubmission override request was approved in.



TCT users will be able to receive notifications for medication resubmission orders that they submitted, which have been approved in the Shipment Resubmission Override process, so that they can track orders efficiently.

Feature Updates: Sprint 12

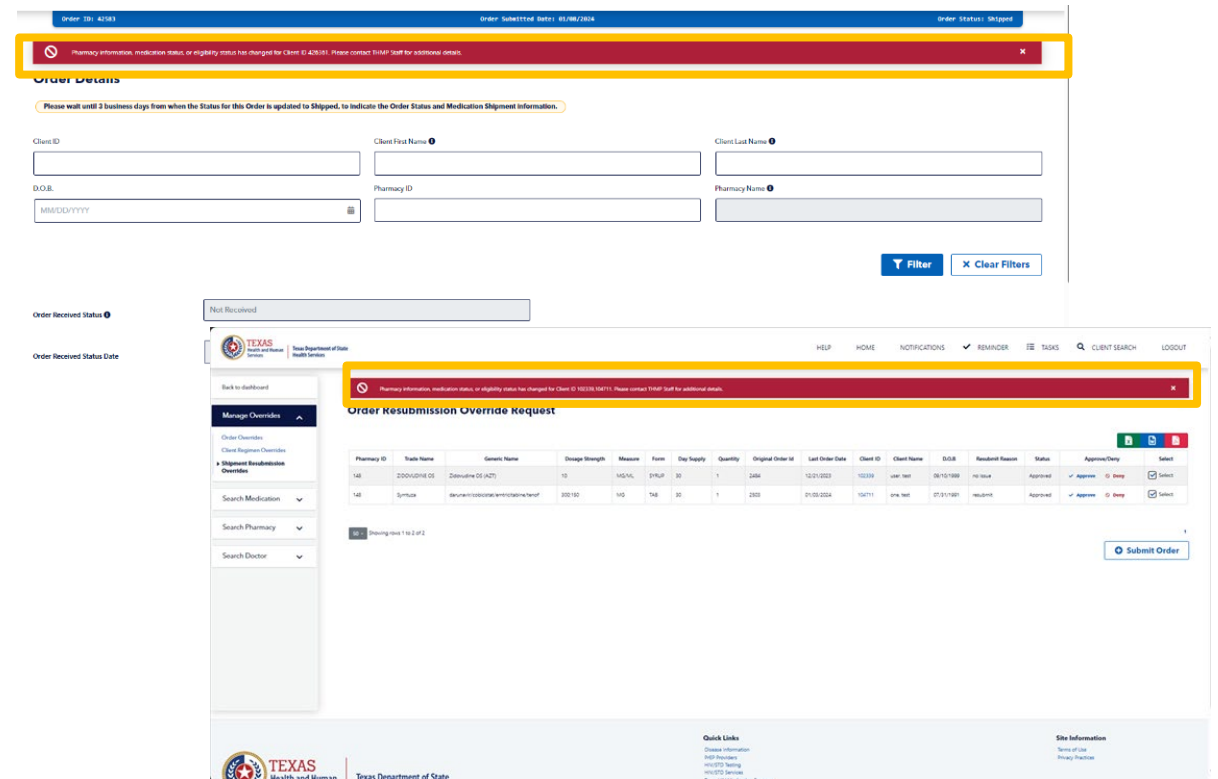
Resubmission of Medications Enhancement

When a User is on the Order Details screen and has selected a medication for resubmission OR a THMP Admin / ADAP Order Processor is on the Shipment Resubmission Overrides screen and selects a medication for approval, the below validations will be verified in the System

- The ordering medication has an Approved status on the Client's Drug Regimen screen
- The Client's pharmacy code is still the same (as it was on the initial order date)
 - This validation will be checked for both primary, secondary pharmacy, and Both.
- The Client's eligibility remains Approved for THMP-ADAP program and is not on hold

If the medication selected for resubmission / approval fails on either of the above validations, then the User will not be able to proceed forward, and the below message will be displayed on the screen

- Pharmacy information, medication status, or eligibility status has changed for Client ID XXX. Please contact THMP Staff for additional details.
 - This validation message will be displayed on both the Add Order screen and the Shipment Resubmission Override screen as applicable.



TCT Users will be able to prevent pharmacists from resubmitting medications for Clients if the pharmacy has changed since the initial receipt of the order, to ensure medications are sent to the Client preferred pharmacy.

Feature Updates: Sprint 12

Update Primary, Secondary, and Subservice Names for HOPWA Contracts

The current Primary Service titled 'Housing Subsidy Assistance' that is associated with HOPWA Service Funding in TCT will be updated to the following language:

- 'Housing Assistance Services'

The below updates will only occur to new data entered in TCT and will not impact any existing data in the system:

- When a user is creating a new contract in TCT and selecting primary and secondary services associated with the contract, the following will occur:
- The below Secondary Services associated with the updated 'Housing Assistance Services' Primary Service will all be consolidated into a single Secondary Service titled 'Short-Term Rent, Mortgage, Utility':
 - Short Term Rent
 - Short Term Mortgage Assistance
 - Short Term Utility Assistance

Service Funding	TL	Primary Service	Secondary Service	Action
HOPWA		Housing Assistance Services	Short-Term Rent, Mortgage, Utility	<input checked="" type="checkbox"/>
HOPWA		Housing Assistance Services	Short-Term Rent, Mortgage, Utility	<input checked="" type="checkbox"/>
HOPWA		Housing Assistance Services	Short-Term Rent, Mortgage, Utility	<input checked="" type="checkbox"/>

When a user navigates to the Provider Agency Subservices page and selects the 'Add' or 'Edit' action for the Short-Term Rent, Mortgage, Utility secondary service, the Subservice Name field will be updated to a picklist format and display the following values for selection:

- Rent, Mortgage, Utility

Provider Agency Subservices

Sub Service ID	Service Funding -> Primary Service	Secondary Service	Subservice	Funding Type	Unit	Default Quantity	Default Price	UOS Goal	UDC Goal	Budget	Actions
0	HOPWA->Housing Assistance Services	Short Term Mortgage Assistance		--	--	0.00	--	--	--	--	Add Edit
2015224	HOPWA->Housing Assistance Services	Short Term Mortgage Assistance	Mortgage	--	--	0.00	--	--	--	--	Add Edit
0	HOPWA->Housing Assistance Services	Short Term Rent		--	--	0.00	--	--	--	--	Add Edit
2015225	HOPWA->Housing Assistance Services	Short Term Rent	Rent	RWHAP	--	0.00	--	--	--	--	Add Edit
0	HOPWA->Housing Assistance Services	Short Term Utility Assistance		--	--	0.00	--	--	--	--	Add Edit
2015226	HOPWA->Housing Assistance Services	Short Term Utility Assistance	Utility	RWHAP	--	0.00	--	--	--	--	Add Edit

Users will not have the ability to add duplicate Subservices for the Short-Term Rent, Mortgage, Utility Secondary Service. If a Subservice already exists for the Secondary Service and the user attempts to add a new Subservice record or edit an existing Subservice record and selects the same Subservice that already exists, they will be prevented from doing so and will receive the below validation:

- The selected Subservice already exists for the Short-Term Rent, Mortgage, Utility Secondary Service. Please select a different Subservice or access the existing Subservice record.

TCT Users will be able to view updated primary, secondary, and subservice names for Short-Term Rent, Mortgage, and Utility services for new HOPWA Contracts to be able to track the services effectively.

Feature Updates: Sprint 12

RSR Client by Zip Code Report

A new ad-hoc report titled 'RSR Client by Zip Code Report' will be available within the Reports tile and display beneath the RSR CARE System-Derived FPL Report.

The RSR Client by Zip Code Report will be available to the following roles:

- HRAR Admins, Data Managers, Agency Client Services Supervisors

HRAR Admins will have the ability to update the roles that have access to the RSR Client by Zip Code Report through the Role to Screen Mapping feature

The following filters will be available at the top of the report:

- Provider Agency, RSR Reporting Year, Zip Code

RSR Client by Zip Code Report

Search Criteria ⓘ

Provider Agency * x

RSR Reporting Year * x

ZipCode

Provider Agency	Zip Code	Count of Clients	Client IDs
4802 - Basin Assistance Services	75657	1	100370

The results table of the RSR Client by Zip Code Report will contain the following column headers:

- Provider Agency
 - This column will display the Provider Agency that the client received services at based on the input provided in the 'Provider Agency' filter and within the provided date range.
- Zip Code
 - This column will display the client's current Physical Address Zip Code. If the client does not have a Physical Address, display the client's current Mailing Address Zip Code.
 - The report will only display a Zip Code as a row on the report if a client who received services at the Provider Agency lives in the Zip Code. The report will not display a Zip Code as a row if there are no clients who received services at the Provider Agency living in the Zip Code.
- Count of Clients
 - This column will display the total count of clients associated with each Zip Code for each Provider Agency.
 - Clients should not be counted or appear on the report twice if they have different Physical Zip Codes and Mailing Zip Codes. System will only report the client as associated with the Physical Address Zip Code. If the client does not have a Physical Address, system will then only report the client as associated with the Mailing Address Zip Code.
- Client IDs
 - This column will display all client IDs associated with each Zip Code that have received services at the selected Provider Agency within the selected RSR Reporting Year.

TCT Users will be able to access a RSR Client by Zip Code report, so that they can use this data for RSR reporting purposes.

Feature Updates: Sprint 12

FPL: RSR CARE System-Derived FPL Report

A new ad hoc report titled RSR CARE System-Derived FPL Report will be created in the Reports tile and will display beneath the RSR Data Completeness Report.

The following user roles will have access to the RSR CARE System-Derived FPL Report:

- HRAR_Admin, AA Data Managers

HRAR Admins will have the ability to update the roles that have access to the RSR CARE System-Derived FPL Report through the Role to Screen Mapping feature

The following filters will be available at the top of the report:

- RSR Reporting Year, Agency or Administrative Agency, System-Derived Household FPL Source

The results will render a downloadable report which is a hyperlink. User may click on the hyperlink to download the report.



The RSR CARE System-Derived FPL Report will provide results for the following data elements:

- Client ID
- System Derived Household FPL
- System Derived Household FPL Source
- System Derived Household FPL Date
- Overriding User
- Reason for Override
- Available Proof of Income Documentation
- Verified Proof of Income Documentation

RSR CARE System-Derived FPL Report

RSR Reporting Year * Agency or Administrative Agency * System-Derived Household FPL Source

Select Select Select

Generate Reset

Back

Client ID	System Derived Household FPL	System Derived Household FPL Source	System Derived Household FPL Date	Overriding User	Reason for Override	Available Proof of Documentation	Verified Proof of Documentation
	0		10/11/2023 3:25:09 PM			No	No
	0		10/11/2023 3:25:09 PM			No	No
	0		10/11/2023 3:53:34 PM			No	No

TCT Users will be able to access a report that provides further details on clients who received CARE Services during a RSR reporting period but are missing their Household FPL as they did not have a CARE eligibility period fall within the RSR reporting period so that they can conduct further research on these clients.