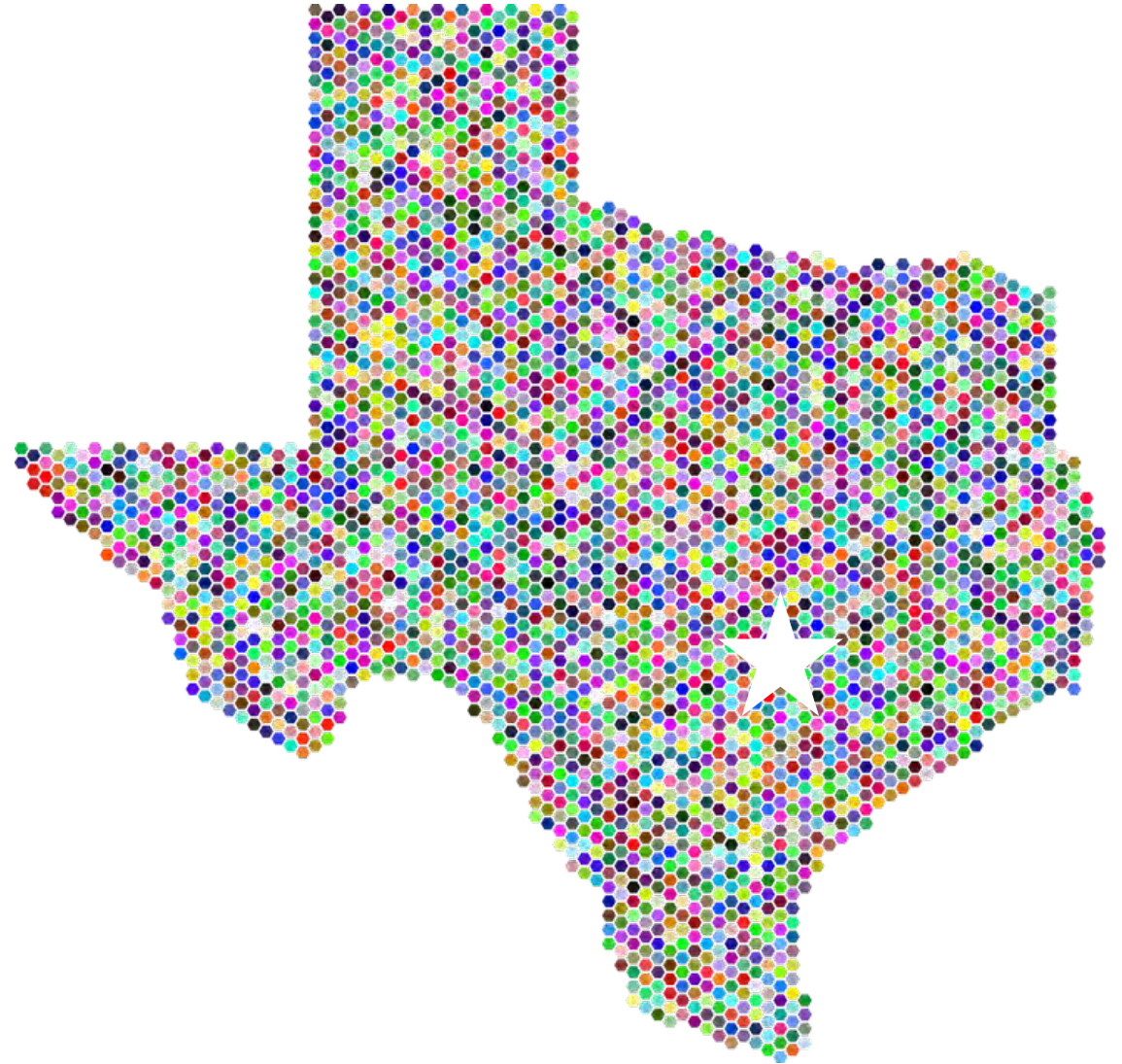


Take Charge Texas (TCT) User Engagement Session

May 18th, 2023



Meet the Facilitators

DSHS/HHSC TEAM



Charletha Joseph
Program Support



Mahesh Rajapaske
Program Support



Rachel Sanor
THMP Director



Christine Salinas
ADAP Manager



Holly Benavides
TCT Help Desk Manager



Ramani Siddharthan
TCT Help Desk



Hillary Alamene
Program Specialist

DELOITTE TEAM



Nikki Fernandes
Project Manager



Meeta Sharma
Test Lead



Hunter Chernyha
Team Lead/Scrum Master



Krishna Dixit
Consultant/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?



Poll Everywhere Response From Session 2

During our 2nd TCT User Engagement User Session, we received feedback from the end-users as to what they hope to learn from the session. Below is the feedback we received.

About 86% of our responders hoped:



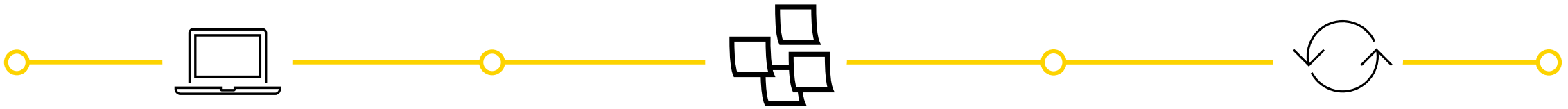
To gain an understanding of the **TCT roadmap and the features that are planned for future development**



To gain an understanding of **how my work will be impacted by new TCT enhancements**

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

- Client Import into TCT & New Client Creation
- TCT Client Import – Successful Creation
- TCT Client Import – Failed Creation
- Adding EUUCI Code as a Search Parameter
- Updating ‘Sex at Birth’ to an Editable Field

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

- 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

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 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

- 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

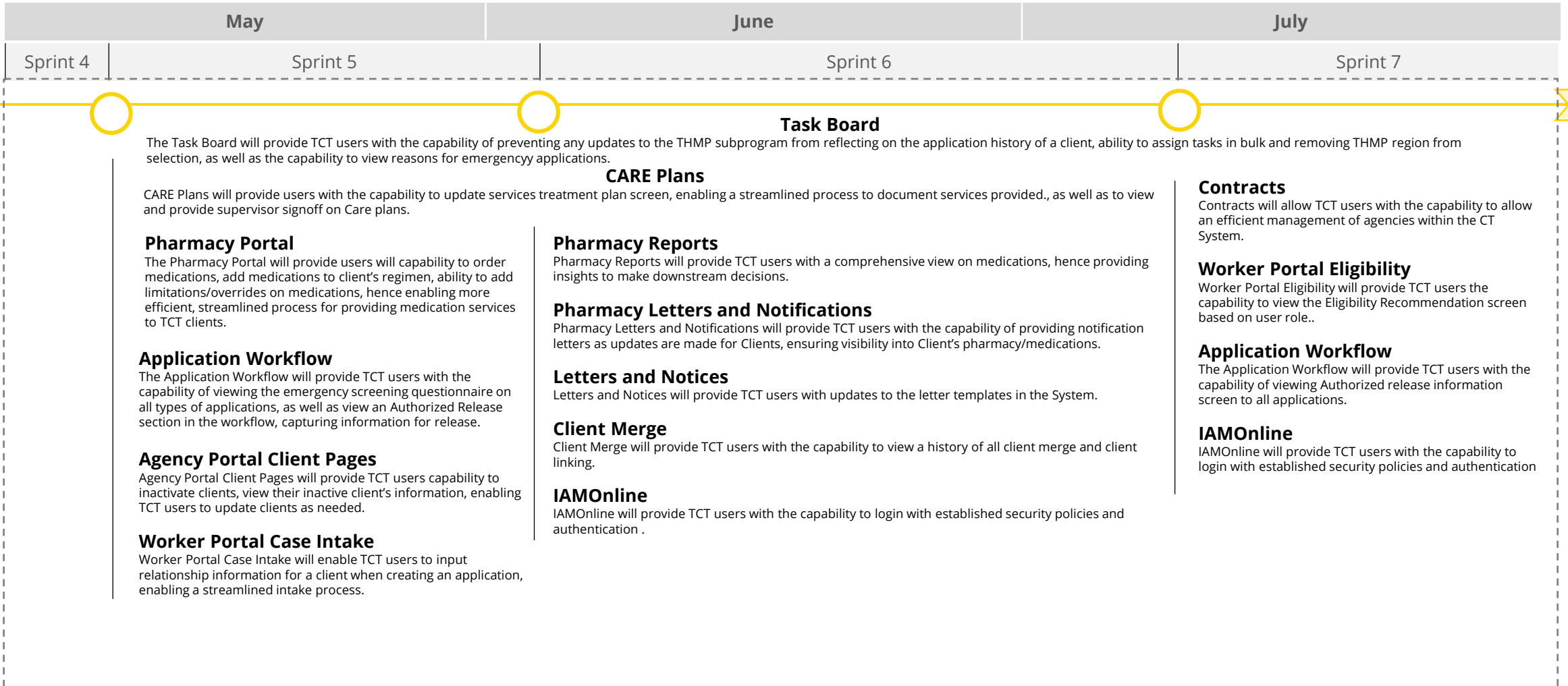
Sprint 4

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

- 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: Short-Term

The graphic below represents the features that we will develop over the next few months and the anticipated impact it will have on TCT users and clients.*



Poll Everywhere

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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? Please click on the appropriate number to submit your answer.



System Overview: **New** TCT Features



Live Demonstration of TCT Features

TCT Features Video Presentation

- [Standard Deduction - THMP Adjusted Household FPL & Standard Deduction Reference Table Management](#)
- [Separate Spouse/Partner/Common Law Relationship Options](#)
- [Add Pharmacy Information to Shipping Details Popup](#)
- [Managing Approvals & Denials of Client Regimen Overrides](#)
- [Order Override Request on Worker Portal Order Screen](#)
- [Day Supply Limitations on Add Prescribed Drug & Worker Portal Order Screens](#)
- [Drug Approval & Regimen Drop Date Details](#)
- [Submitting Client Regimen Overrides](#)
- [Add Agency or Admin Agency Filters on Client Merge & Duplicate Client Identification Reports](#)



Gathering Your Feedback



Poll Everywhere Response From Session 2

During our 2nd TCT User Engagement User Session, we received feedback from the end-users on the additional items they'd like to see for future sessions. We heard the below feedback.

I would like to see walkthroughs on TCT processes such as:

- Applying for CARE only
- Applying for THMP only
 - Running Eligibility
 - Completing a care plan
- Other functions users need to know in the field that DSHS staff should be trained on

I would like to see:

- Updating primary email and phone number
 - Updating Current Gender Identity
- Adding Primary HIV Medical Provider option as well as PCP (some places don't have medical providers that do both)
- Ability to add Date of Encounter to Case Notes that is different from date note entered

Poll Everywhere

Poll Everywhere

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PollEV.com/tctdshsstaff

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PollEV.com/tctnondshsstaff

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



Next Steps



TakeChargeTexas Survey

Our team has shared a brief survey to gather additional feedback, suggestions, or recommendations for the TakeChargeTexas application. Your responses are anonymous; however, you have the option of including your contact information if desired. This survey has 7 questions and should take less than 5 minutes to complete.

Survey Link: <https://forms.office.com/r/RGNmPfZiTs>

Survey Due: Friday, May 19th

Survey Goals:

- Help Department of State Health Services understand your level of satisfaction with the current system
- Provide insights into how we can improve the system to make your day-to-day job more efficient
- Results will inform future project communications and training activities and will serve as a baseline for future user engagement checks

Upcoming Activities

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



Charletha Joseph

Charletha.Joseph@dshs.texas.gov



Mahesh Rajapakse

Mahesh.Rajapakse@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, June 21st.



Our team has shared a **brief survey** to gather additional feedback, suggestions, or recommendations for the TakeChargeTexas application.

We kindly request you to complete it!

Thank You!

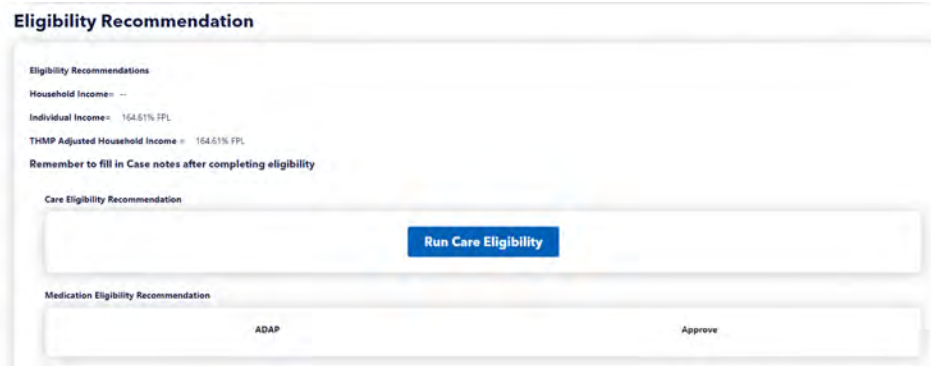
System Overview: **New** TCT Features



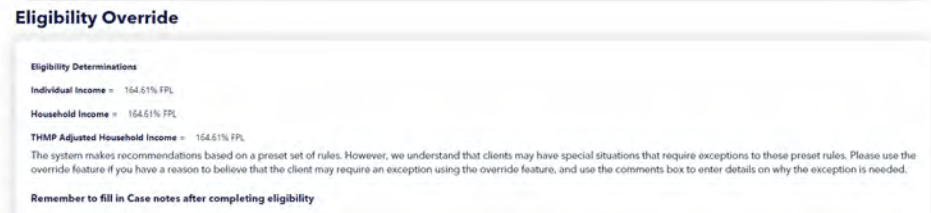
Feature Updates: Sprint 4

THMP Adjusted Household FPL

Eligibility Recommendation screen

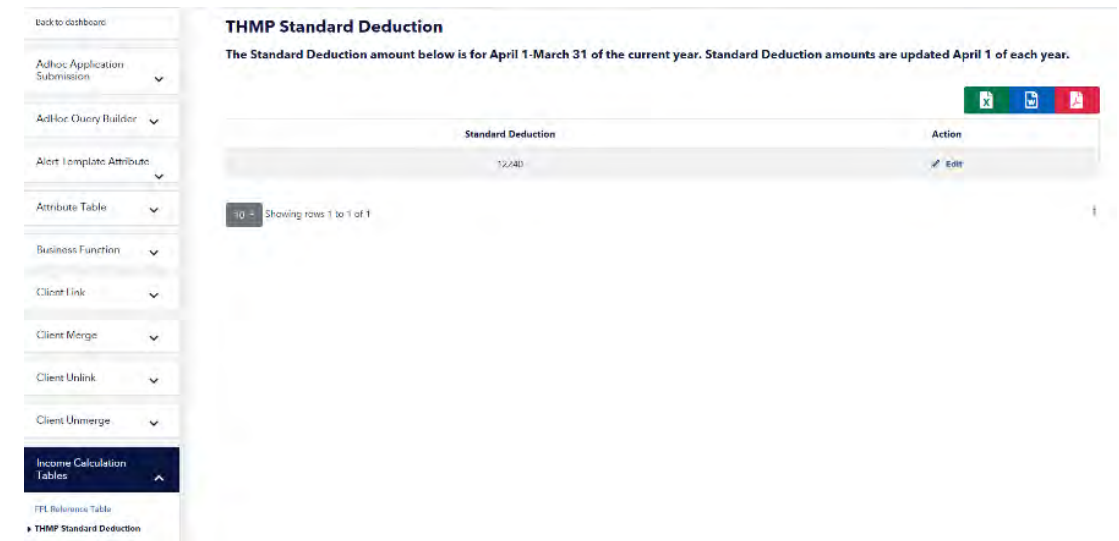


Eligibility Override screen



TCT Users will be able to view the THMP Adjusted Household FPL that was calculated using the standard deduction, so that they can determine if Client is eligible for THMP services.

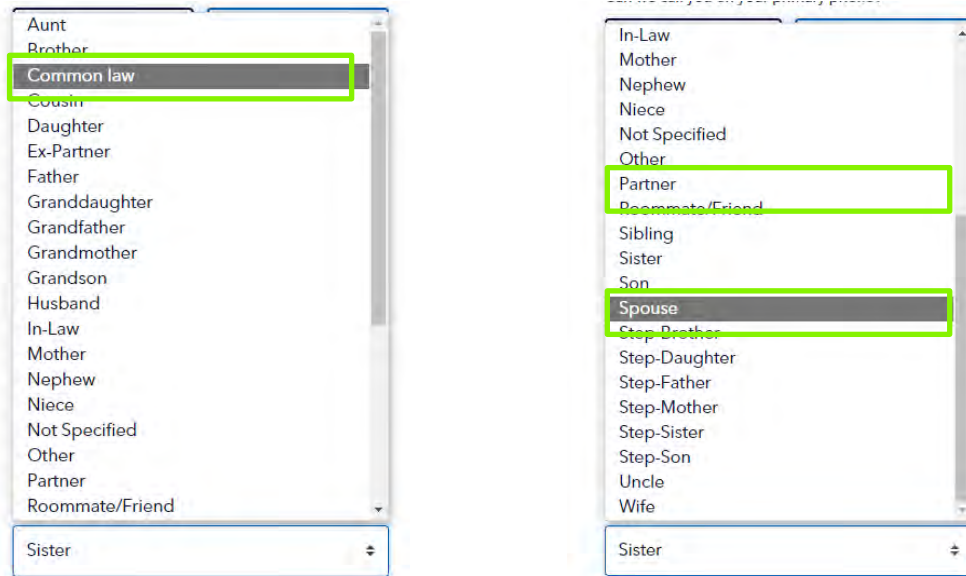
Standard Deduction Reference Table Management



TCT Admins will be able to update the standard deduction amount each year so that they can calculate clients' the THMP Adjusted Household FPLs accordingly as the standard deduction may change each year.

Feature Updates: Sprint 4

Separate Spouse/Partner/Common Law Relationship Options



On the 'Add a Household Member' pop-up, the following questions are displayed for 'Husband', 'Wife', 'Spouse', and 'Common Law' relationships.

The image shows a screenshot of the 'Add a Household Member' form. The 'Relationship' dropdown menu is set to 'Spouse'. Below the dropdown, there are two questions with radio button options: 'Is the spouse/partner aware of the Client's HIV status?' and 'Is the spouse/partner receiving Ryan White Benefits?'. The form also includes fields for 'First Name', 'Last Name', 'Middle Initial', 'Date of Birth', 'Social Security Number', 'Gender', 'Medical Insurance', and 'Phone Number'. A question 'Does this person live with the Client?' is also present with radio button options for 'No' and 'Yes'.

TCT users will be able to view the Spouse/partner/common law option in the related individuals' relationship dropdown, separated to 'Spouse', 'Partner', and 'Common Law', so that they are able to differentiate between these relationship categories and determine if the individual is also receiving Ryan White Benefits

Feature Updates: Sprint 4

Add Pharmacy Information to Shipping Details Popup

Shipment Number	Shipment Status	Pharmacy ID	Pharmacy Name	Pharmacy Address
565632532024	Shipped	89	Bluitt-Flowers Health Center Pharmacy	303 E. Overton, Dallas, TX 75216
565632532090	Shipped	132	COPC Pharmacy - Southeast Campus	5202 ELAM ROAD, Dallas, TX 75217
565632531841	Shipped	148	Amex Pharmacy	3030 Canal St, Houston, TX 77003
565632532274	Shipped	217	ReCept Pharmacy #1	800 Eighth Ave #130, Fort Worth, TX 76104
565632531863	Shipped	229	HEB Pharmacy #755	2301 S Congress, Austin, TX 78704
565632532002	Shipped	486	Barnes & Williams Drug Center	701 Hickory St, Abilene, TX 79601
565632531690	Shipped	494	PMO Pharmacy Management	2255 Woodward Ave, Shreveport, LA 71103
565632532344	Shipped	626	Luna's Friendly Pharmacy	2176 E Garrison St., Ste D, Eagle Pass, TX 78852
565632531668	Shipped	663	ReCept Pharmacy #75	10412 Vista Del Sol, Ste 1A, El Paso, TX 79925
565632532252	Shipped	692	CVS # 17234 at Target	301 E Morrison Rd, Brownsville, TX 78526

TCT users will be able see additional details related to the pharmacy in the Shipping Details pop-up of medication orders that have been submitted to the warehouse.

Order Override Request on Worker Portal Order Screen

Order Conflicts

Medicines that failed the automated check appear below with denial reasons. You can either remove the conflicts or submit an override request with a reason. Note: Upon submitting all the requests, the non-conflicted order items will be sent to the warehouse in a separate order.

Pharmacy ID	Trade Name	Generic Name	Dosage Strength	Measure	Form	Day Supply	Quantity	Last Order Date	Denial Reason	Client ID	Client Name	D.O.B	Reason for Override	Actions
148	GENVOYA (30/btl)	Genvoya	150:200:10	MG	TAB	30	1	04/19/2023	Client shows active Medicaid, THMP Staff must verify	418158	Munoz Olvera, Elly	08/27/1965	Reason for Override	<input type="checkbox"/> Submit Override Request Remove

TCT Users will be able to request an override on the Worker Portal Order Screen if their client has Medicaid/CHIP insurance, to ensure the client is eligible to receive medication assistance from THMP, as they have Medicaid insurance.

The Denial Reason column for this will display the following reason: Client shows active Medicaid, THMP Staff must verify.

Feature Updates: Sprint 4

Day Supply Limitations on Add Prescribed Drug & Worker Portal Order Screens

Drug Details

Trade Name *	Generic Name *	Abbr
ROFERON A IV	Interferon Alfa IV	ROFRN-A IV
Drug Class	Drug Group	Drug Code
OI	ROFRN	25
Dosage Strength *	Form *	Measure
1B	INJ PWD F/	ML/VIAL
AEV? *	Client As *	NDC Code *
No	0	00004201109
Pkg Size *	Package *	Cost
3 ML	VIAL	\$ 98.88
Min Day Supply *	Max Per Month *	Medicaid Clients Eligible
30	0	Yes

Error message on Add Prescribed Drug screen

Add Prescribed Drug

Please Note: All medications require prescriptions written by an authorized prescriber, regardless of who enters the information in TCT. The prescriptions must be sent to the assigned pharmacy.

Search for drugs to add to client's drug regimen. Note: upon clicking add, the screen refreshes and saves to the regimen. If you wish to see the current regimen, click 'Rx Back'

Drug Code: 45 Trade Name: Generic Name:

[% Back](#) [Search](#)

Search Results

Drug Code	Trade Name	Generic Name	Dosage Strength	Measure	Form	Count As	Day Supply	Min Day Supply	Dosage Frequency	Status	Is the client new to this Drug?	Add Drug
45	ROFERON A	Interferon	300	MC	CAP (INJ)	1	2	1		Dispensed	Is the client new to this Drug?	Select

Error message on Worker Portal Order screen

Add Prescribed Drug

Please Note: All medications require prescriptions written by an authorized prescriber, regardless of who enters the information in TCT. The prescriptions must be sent to the assigned pharmacy.

Search for drugs to add to client's drug regimen. Note: upon clicking add, the screen refreshes and saves to the regimen. If you wish to see the current regimen, click 'Rx Back'

Drug Code: 45 Trade Name: Generic Name:

[% Back](#) [Search](#)

Search Results

Drug Code	Trade Name	Generic Name	Dosage Strength	Measure	Form	Count As	Day Supply	Min Day Supply	Dosage Frequency	Status	Is the client new to this Drug?	Add Drug
45	ROFERON A	Interferon	300	MC	CAP (INJ)	1	2	1		Dispensed	Is the client new to this Drug?	Select

TCT users will not be able to add values less than the indicated value for the drug's minimum day supply, in the Day Supply column of the Add Prescribed Drug and Worker Portal Order Screens.

TCT Users will now be able to edit the Day Supply field on the Worker Portal Order screen, a capability which now allows Users to order more, as needed for the Client.

Feature Updates: Sprint 4

Drug Approval & Regimen Drop Date Details

Prescribed Drugs

TX MD/DO License # * Doctor Name:

Status:

Trade Name	Generic Name	Dosage Strength	Measure	Form	Count As	Day Supply	Dosage Frequency	TX MD/DO License #	New Drug to Client?	Status	Approval Date	Regimen Drop Date	Drop?
FLUCONAZOLE (30/bt)	Fluconazole	200	MG	TAB COATED	0	60		CONV0117		Approved	04/24/2023	---	<input type="button" value="Drop"/>
ZIDOVUDINE (60/bt)	Zidovudine (AZT)	300	MG	TAB	1	30		CONV0118		Approved	05/05/2023	---	<input type="button" value="Drop"/>
NORVIR OS (240 ml/bt)	Ritonavir OS	80	MG/ML	LIQ	1	40		CONV0117		Approved	04/24/2023	---	<input type="button" value="Drop"/>
ZIDOVUDINE OS (240 ml/bt)	Zidovudine OS (AZT)	10	MG/ML	SYRUP	1	30		CONV0117		Override Pending	---	---	<input type="button" value="Drop"/>

Below is the pop-up when the Drop Date hyperlink is clicked

Drop Details

Dropped By:

Provider Agency:

Drop Date:

Below is the pop-up when the Approval Date hyperlink is clicked

Approval Details

Added By:

Provider Agency:

Approval Date:

TCT users will be able to view information related to who added or dropped a drug from a client’s drug regimen so that they can reach out to this individual for further investigation if needed.

Feature Updates: Sprint 4

Submitting Client Regimen Overrides

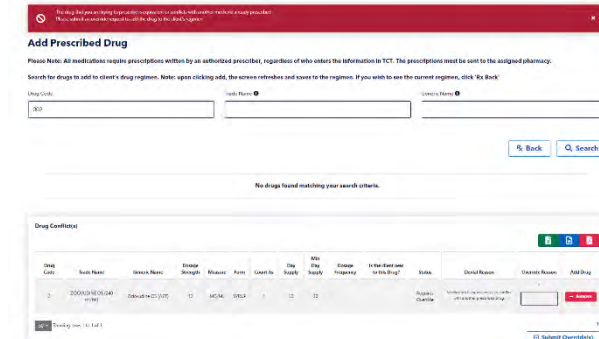
The 'Drug Details' form contains the following fields:

- Trade Name: KALETRA CS (Tablets)
- Generic Name: Lopinavir/Ritonavir DS
- Abb: KALETRA CS
- Drug Class: IT
- Drug Group: KALETRA
- Drug Code: 88
- Change Strength: 400/100
- Form: SOL
- Message: MCMC/SM
- APD: Yes
- Classified As: 1
- NDC Code: 0001437544
- Reg Size: 140 ML
- Package: BOT
- Cost: \$ 189.81
- Min Day Supply: 30
- Max Per Month: 2
- Medicaid/Covered Eligible: Yes
- Notes: [Empty]
- Approved Date: [Empty]
- Drug Date: [Empty]
- Drug Requires Override: **Yes** (highlighted in green)
- Confirm Reason: Select
- ADD as a brand? Select

Drug Requires Override populated as 'Yes' message



Drug Equivalent or Conflict with another drug message



TCT Users will be able to request an override on the system on the Add Prescribed Drug screen, so that they can prescribe medications and add them to their client's drug regimen.

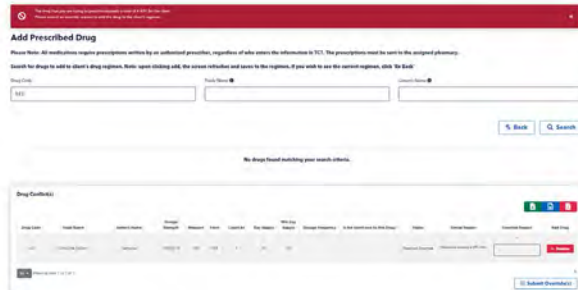
The following conditions will trigger the need for a Client Regimen override when adding drugs to a client's Add Prescribed Drugs page:

- The drug has 'Drug Requires Override' populated as 'Yes' on its Drug Details page
- The drug is listed as a Drug Equivalent or Conflict with another drug that is prescribed to the client
- The prescribed drugs exceed a total of 4 ARV for the client

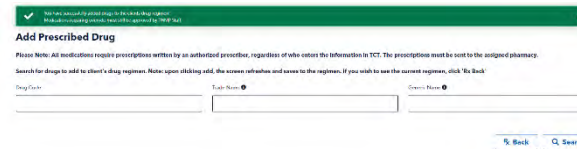
Feature Updates: Sprint 4

Submitting Client Regimen Overrides (Continued)

Drug exceeds a total of 4 ARV limit message



Message after submission of override request



TCT Users will be able to request an override on the system on the Add Prescribed Drug screen, so that they can prescribe medications and add them to their client's drug regimen.

The following conditions will trigger the need for a Client Regimen override when adding drugs to a client's Add Prescribed Drugs page:

- The drug has 'Drug Requires Override' populated as 'Yes' on its Drug Details page
- The drug is listed as a Drug Equivalent or Conflict with another drug that is prescribed to the client
- The prescribed drugs exceed a total of 4 ARV for the client

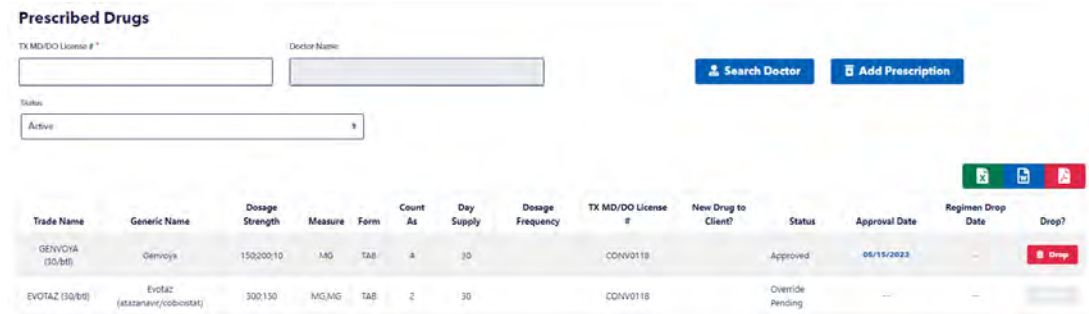
Feature Updates: Sprint 4

Submitting Client Regimen Overrides (Continued)

Medications that undergo an override will require Users to enter in the reason for override



Once override is requested, the Client Regimen screen will display the medication as 'Override Pending'



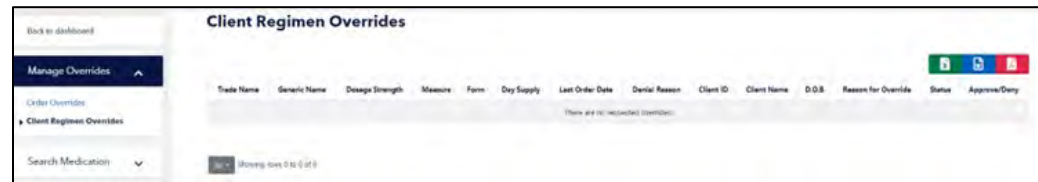
TCT Users will be able to request an override on the system on the Add Prescribed Drug screen, so that they can prescribe medications and add them to their client's drug regimen.

The following conditions will trigger the need for a Client Regimen override when adding drugs to a client's Add Prescribed Drugs page:

- The drug has 'Drug Requires Override' populated as 'Yes' on its Drug Details page
- The drug is listed as a Drug Equivalent or Conflict with another drug that is prescribed to the client
- The prescribed drugs exceed a total of 4 ARV for the client

Feature Updates: Sprint 4

Managing Approvals & Denials of Client Regimen Overrides



When a drug regimen conflict is pending override approval, the Status of the drug will display as 'Override Pending' on the Prescribed Drugs page.

Prescribed Drugs

TX MD/DO License # * Doctor Name:

[Search Doctor](#) [Add Prescription](#)

Status:

Trade Name	Generic Name	Dosage Strength	Measure	Form	Count	Day Supply	Dosage Frequency	TX MD/DO License #	New Drug to Client?	Status	Approval Date	Regimen Drop Date	Drop?
GENVOYA (30/60)	Genojoya	150/200/10	MG	TAB	4	30		CONV0118		Override Pending			
FLUCONAZOLE (30/60)	Fluconazole	200	MG	TAB COATED	0	60		CONV0117		Approved	04/24/2023		Drop

When a drug regimen conflict is approved, the Status of the drug will update to 'Approved' and the Approval Date will become populated on the Prescribed Drugs page.

TX MD/DO License # * Doctor Name:

[Search Doctor](#) [Add Prescription](#)

Status:

Trade Name	Generic Name	Dosage Strength	Measure	Form	Count	Day Supply	Dosage Frequency	TX MD/DO License #	New Drug to Client?	Status	Approval Date	Regimen Drop Date	Drop?
GENVOYA (30/60)	Genojoya	150/200/10	MG	TAB	4	30		CONV0118		Approved	05/15/2023		Drop
FLUCONAZOLE (30/60)	Fluconazole	200	MG	TAB COATED	0	60		CONV0117		Approved	04/24/2023		Drop

When a drug regimen conflict is denied, the Status of the drug will update to 'Override Denied' on the Prescribed Drugs page.

TX MD/DO License # * Doctor Name:

[Search Doctor](#) [Add Prescription](#)

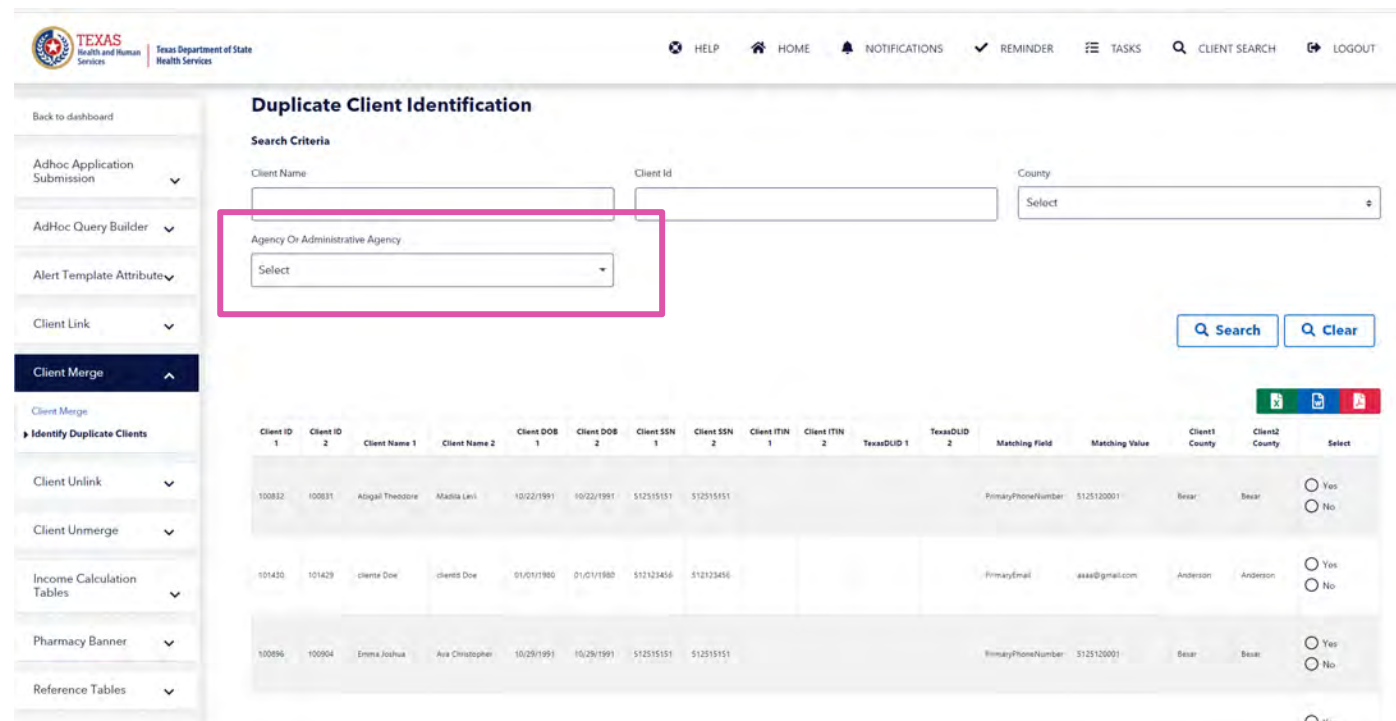
Status:

Trade Name	Generic Name	Dosage Strength	Measure	Form	Count	Day Supply	Dosage Frequency	TX MD/DO License #	New Drug to Client?	Status	Approval Date	Regimen Drop Date	Drop?
GENVOYA (30/60)	Genojoya	150/200/10	MG	TAB	4	30		CONV0118		Approved	05/15/2023		Drop
EVOYAZ (30/60)	Evetaz (atazanavir/robicicicic)	300/150	MG/MG	TAB	2	30		CONV0117		Override Denied		05/15/2023	

TCT Admin and ADAP Order Processors will be able to review a screen related to clients' drug regimen conflicts noted by the system so that they can approve/deny overrides and add the drug to the client's regimen.

Feature Updates: Sprint 4

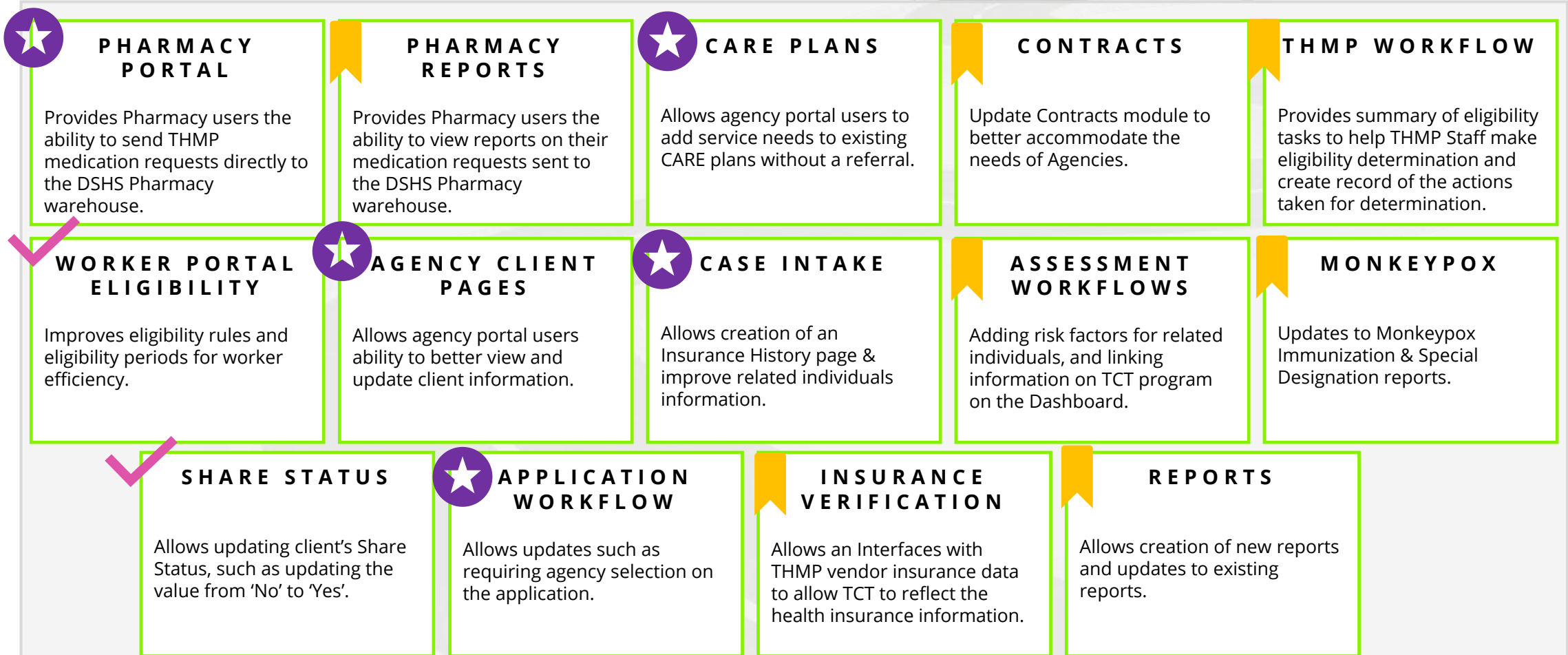
Add Agency or Admin Agency Filters on Client Merge & Duplicate Client Identification Reports



TCT Users will be able to view a filter for Agency or Administrative Agency on the Duplicate Client Identification Report and the Client Merge Report, to filter out clients based on the providers and admin agency the Client is associated with.

Project Plan: Long-Term

The graphic below represents the features our teams plan to develop throughout the year*.



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