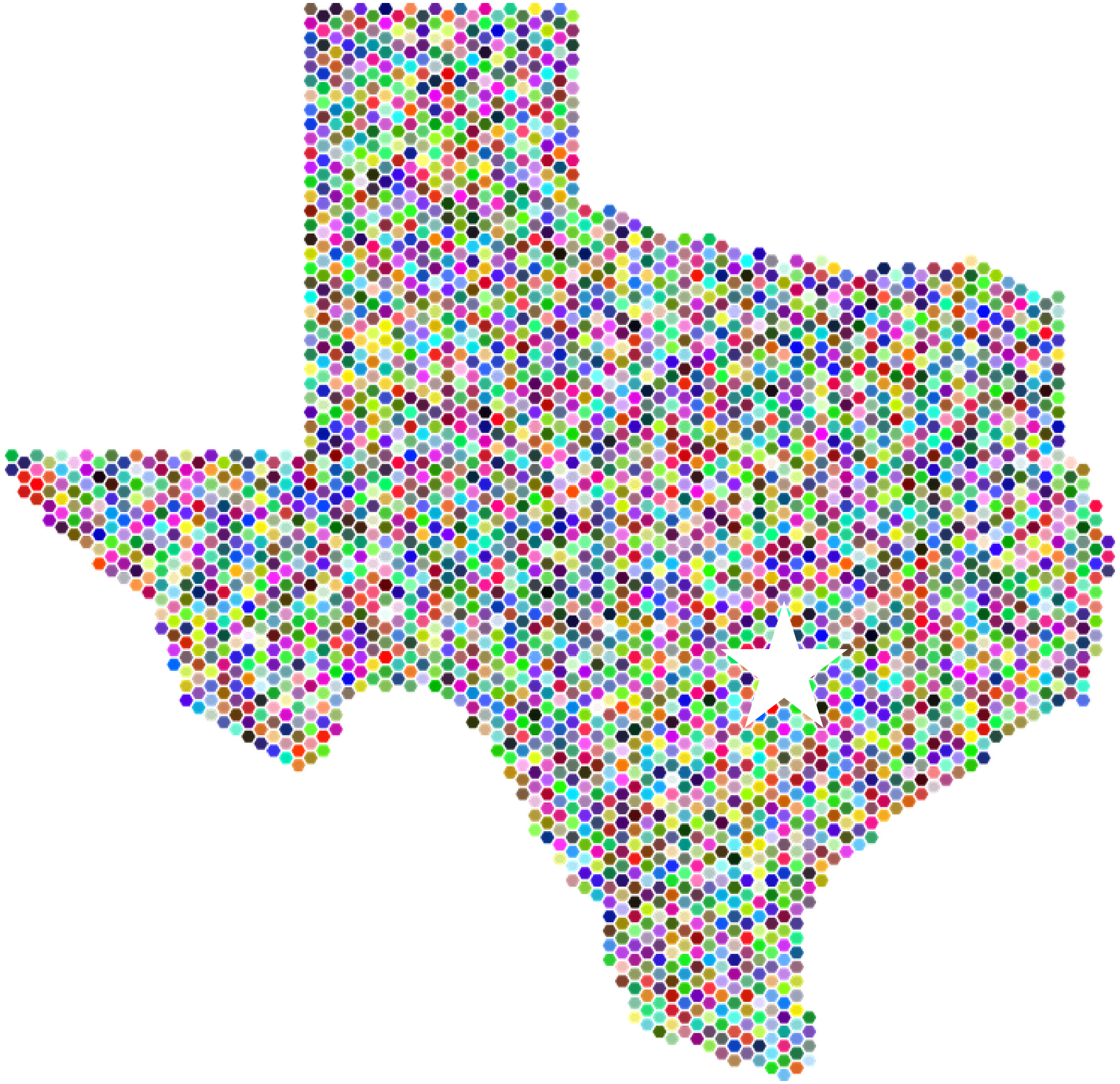
Take Charge Texas (TCT)
User Engagement Session

September 21st , 2023



Meet the Facilitators

DSHS/HHSC TEAM

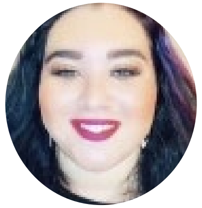
Charletha Joseph
Program Support

Rachel Sanor
THMP Director

Christine Salinas
ADAP Manager

Holly Benavides
TCT Help Desk Manager

Ramani Siddharthan
TCT Help Desk



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

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

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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 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

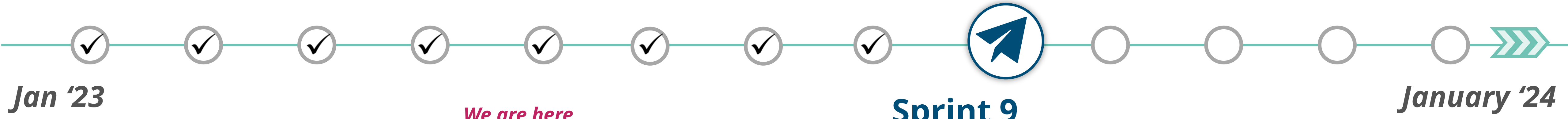
Sprint 6
- Shingrix Vaccine Enhancements
- Exclude ADAP Clients on Hold From the Clients Coming Up For Renewal Report
- Update Client Letter Templates
- Monthly Pharmacy Orders Report
- Generating Letters by Client ID
- Update Letter Triggering Conditions
- Client/Pharmacy Update Letter Pharmacy Copy
- 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: In Progress Features

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



We are here

Sprint 9

Focused on providing enhancements to the Pharmacy Portal and improving client privacy in the TCT Portal. Additionally, will be providing enhancements to the Medical and Client Services import process for agencies.

- Masking SSN on Client Search and Client Details Screens
- Display Order Created By on Order Dashboard
- Notification for Order Override Denials for Pharmacist
- Notification for Order Override Approvals for Pharmacist
- Real Time Order Status Updates from PIMS
- Real Time Order Submission to PIMS
- 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
- Generating Pharmacy Copy Letters Based on Latest Transaction
- Updated Services Import XML Process to Include AIDN
- Updated Medical Import XML Process to Include AIDN

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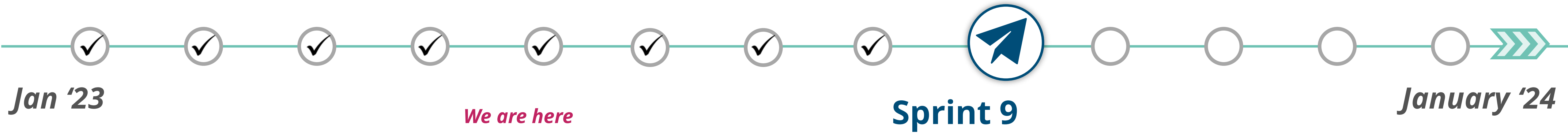

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Project Plan: Upcoming Features

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

* **Sprint 10**
10/2 – 10/27

- Agency Portal Client Pages
- Pharmacy Portal
- Application Workflow
- Eligibility
- Interfaces

Sprint 11
10/30 – 11/24

- Agency Portal Client Pages
- CARE Plans
- Contracts
- Create & Manage Account
- Client Search

Sprint 12
11/27 – 12/22

- Reports

* **Sprint 13**
1/2 – 1/26

- Reports

Key
- THMP
- CARE
- General

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

Poll Everywhere

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PollEV.com/tctdshsstaff

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

- 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 & Displaying Override Comments after Eligibility is Complete
- Ability to Manually End Ongoing Eligibility
- Capturing Hold History for Manual/Automatic Holds
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Gathering Your Feedback

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

How to Provide Feedback to TCT?

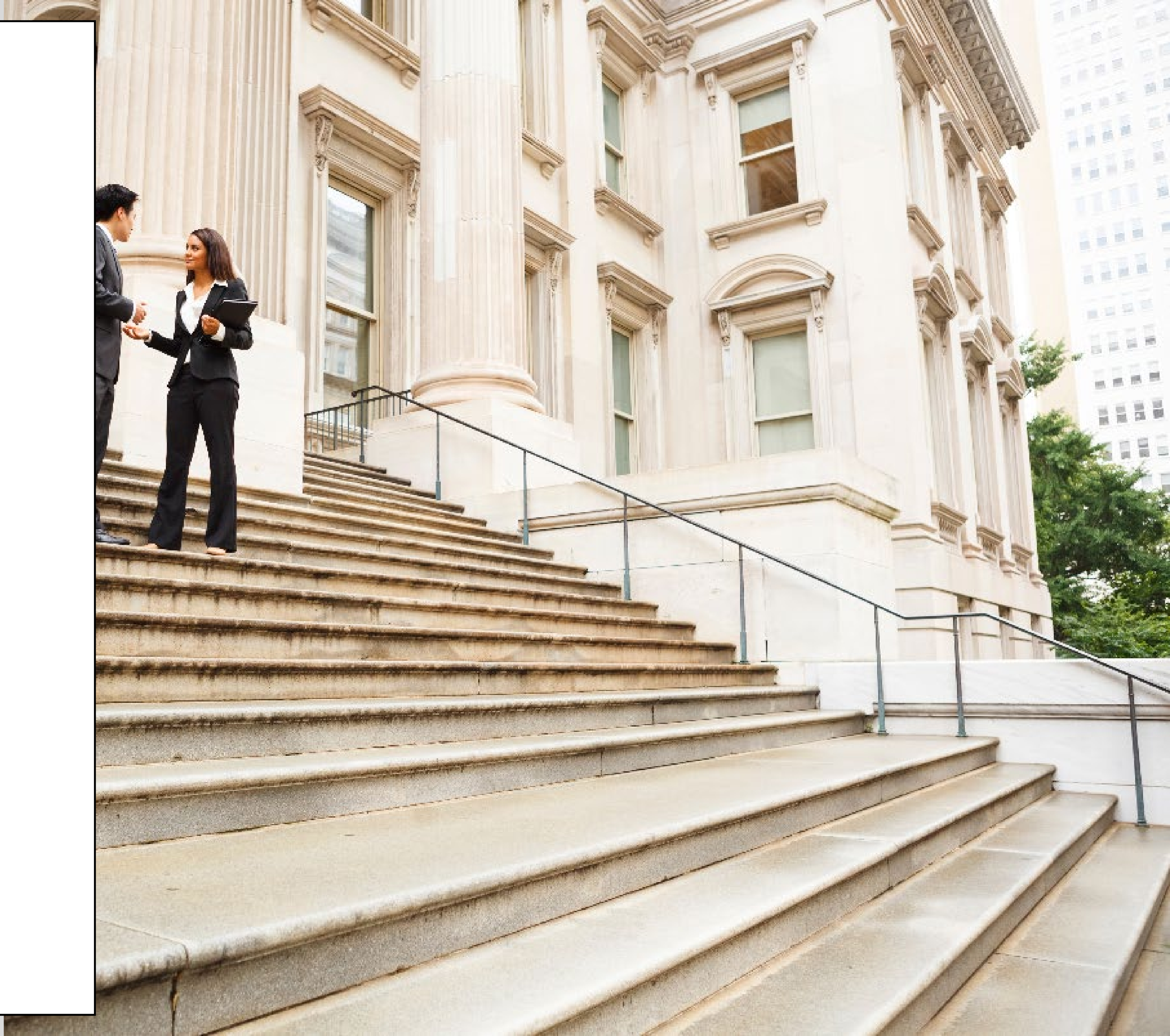
The **TakeChargeTexas Portal**, is a system with a goal to benefit all end users – providers, admins and clients. To achieve future growth and scale, **we request you to provide your suggestions and feedback.**

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, October 19th .

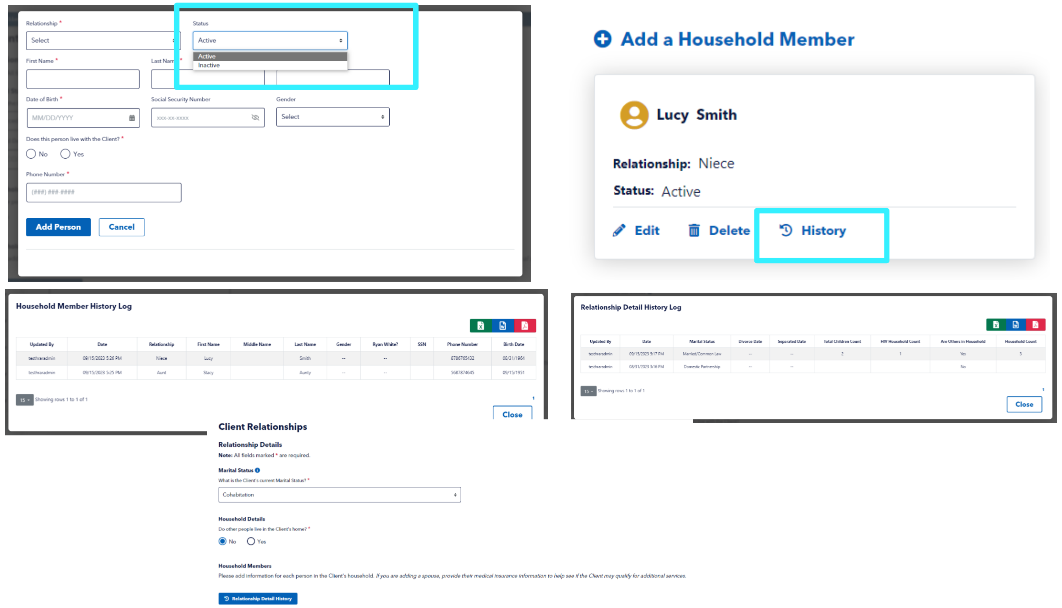
Thank You!

System Overview: New TCT Features

Feature Updates: Sprint 8

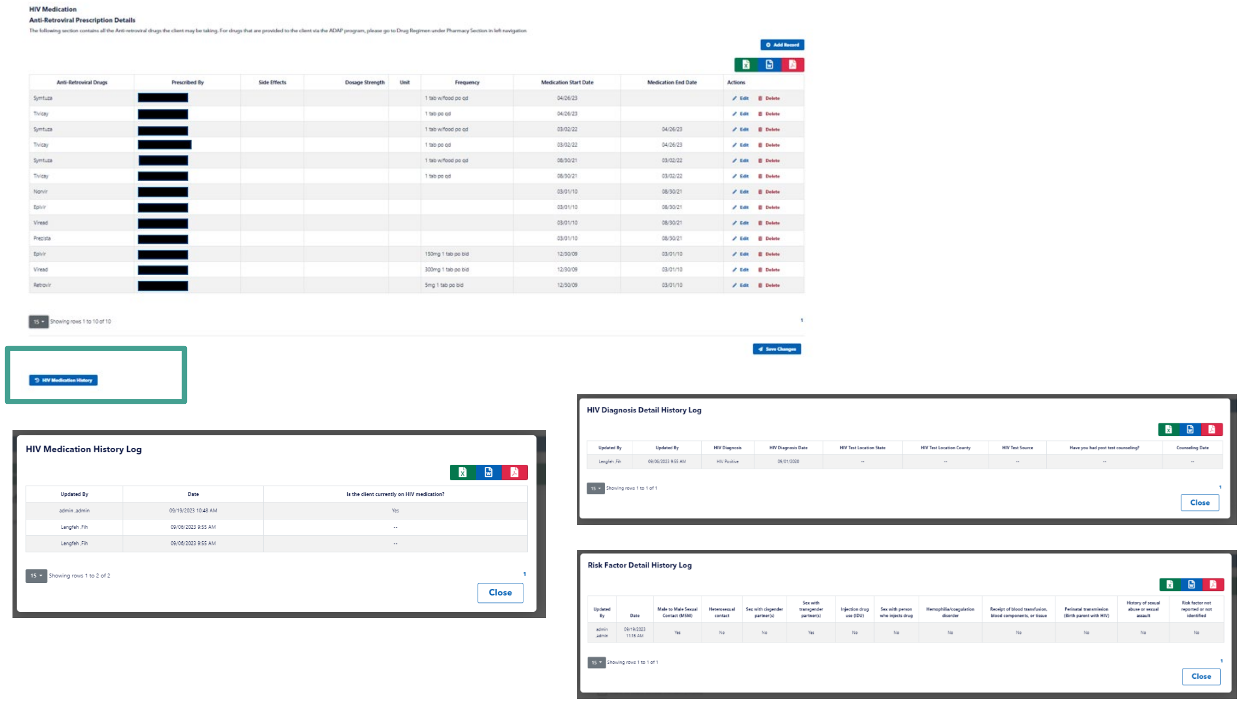
Creating History Logs: Relationships

TCT Users will now be able to click on the 'Relationship Detail History' hyperlink and view a pop-up which details the updates conducted related to this screen for specific fields post the implementation of this feature.



TCT Users will have the ability to track when changes are conducted on the 'Relationships' page of a client so that they can be aware of the client's history.

Creating History Logs: Medical Data

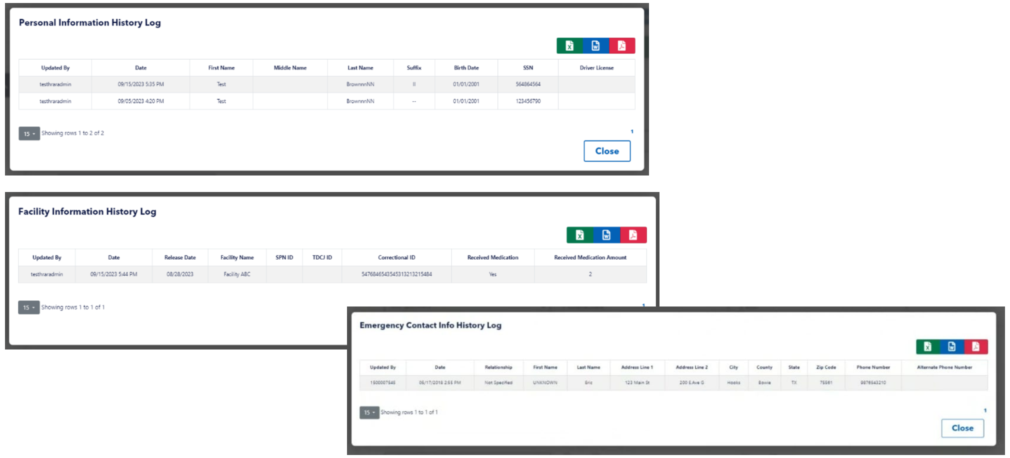


TCT Users will be able to track when changes are conducted on the HIV Diagnosis Details, HIV Medication Info, and Risk Factors pages of a client so that they can be aware of the client's history.

Feature Updates: Sprint 8

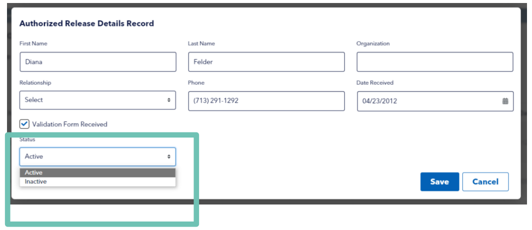
Creating History Logs: About You Information

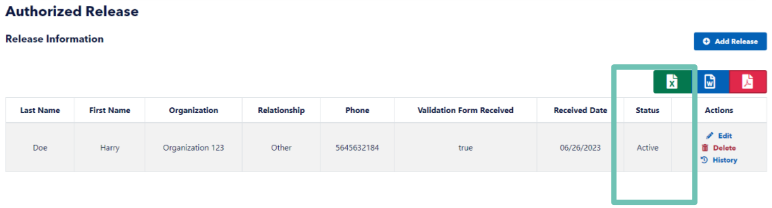
TCT Users will now be able to click on the 'Personal Information History', 'Facility Information History', 'Physical Address History', 'Mailing Address History', 'Contact Info History' and 'Emergency Contact History' hyperlinks and view a pop-up which details the updates conducted related to this screen for specific fields post the implementation of this feature.



TCT users will be able to track when changes are conducted on the 'About you' page of a client so that they can be aware of the client's history.

Creating History Logs: Authorized Release





TCT Users will now be able to click on the 'History' hyperlink for each particular record and view a pop-up which details the updates conducted related to that particular record for specific fields post the implementation of this feature.

TCT Users will be able to track when changes are conducted on the 'Authorized Release' page of a client so that they can be aware of the client's history.

Feature Updates: Sprint 8

Updates to Automated & Manual Client Merge Exception Handling

In the following scenarios, it will no longer throw an error and instead proceed with the automated and manual merge process:

- *Two clients undergoing merge have different Share Status*
    - *Both automated and manual merge process will pick up the latest data for Share Status, based on the latest transaction, for the new merged client ID*
- *Two clients undergoing merge have same Share Status (both with No as Share Status)*
    - *Both automated and manual merge process will pick up 'No' as the Share Status for the new merged client ID*
- *Two clients undergoing merge have different Client Status (one Client has a status of 'Active' and the other has a status of 'Inactive' with "Inactive Other' as the Inactive Type)*
    - *Both automated and manual merge process will pick up 'Active' as the Client Status for the new merged client ID*
- *Two clients undergoing merge have same Client Status (with both as 'Other Inactive Type' or both as 'Deceased')*
    - *Both automated and manual merge process will pick up 'Inactive' as the Client Status for the new merged client ID*
- *Two clients undergoing merge have conflicting THMP/CARE subprogram*
    - *Both automated and manual merge process will pick up the THMP/CARE subprogram which has the latest Eligibility Decision Date for the new merged client ID*

***Manual Merge Only**: Two clients undergoing merge have same CARE subprogram*

- *The process will move forward with consolidating all CARE services and retains the care services with the latest 'Added On' date per service record for the new merged client ID*

TCT users will be able to view clarified questions on the Relationships page of the application workflow and Relationships page of the client dashboard to be able to gather data accurately. This is applicable to both Agency and Client Portal.

Feature Updates: Sprint 8

Update THMP Denial, Pend, & Reject Reasons when Overriding Eligibility Recommendation

The list of Reject and Denial Reasons, when a User chooses to override the system recommendation THMP eligibility and chooses to reject/deny the client, has been updated to the below.

Updated List of Reject & Denial Reasons: Override Only
Deceased
Does not meet insurance eligibility requirements - ACA Plan
Does not meet insurance eligibility requirements - Medicare and Full LIS
Does not meet insurance eligibility requirements - Private insurance
Does not meet residency eligibility requirements (out-of-state, out of service area)
Failure to provide acceptable proof of residency
Failure to provide acceptable Health Insurance Information
Failure to provide acceptable Proof of Income or Support for applicant or spouse
Failure to provide more than one of the following: Proof of Income, Proof of Residency, Proof of Diagnosis, Health Insurance Information
Failure to provide proof of household change, when required
Failure to provide verification documents, when required
Inactivity Denial
Incarcerated
Income exceeds eligibility requirements based on FPL
Lives in a Nursing Home, Hospital, or other community facility responsible for medical care
Missing Proof of Diagnosis
Negative HIV Confirmatory Test Result
One or more pages are missing from the application or parts of the application are blank
Other
TCT error (such as approved by unauthorized staff member, duplicate, etc.)
The application is not dated
The application is not signed
The application signature and date are over 60 days old
Voluntary Application removal by client or Agency Worker

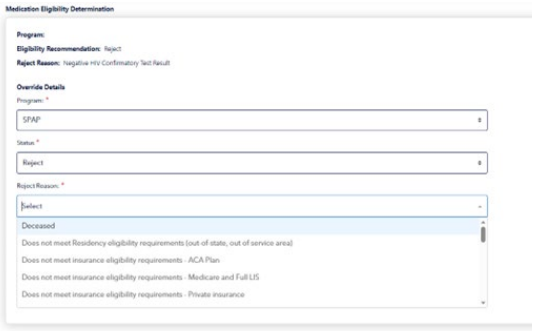
The list of Pend Reasons, when a User chooses to override the system recommendation THMP eligibility and chooses to pend the client, has been updated to the below:

- *The 'Other' value is updated to no longer display a free-text field once selected*

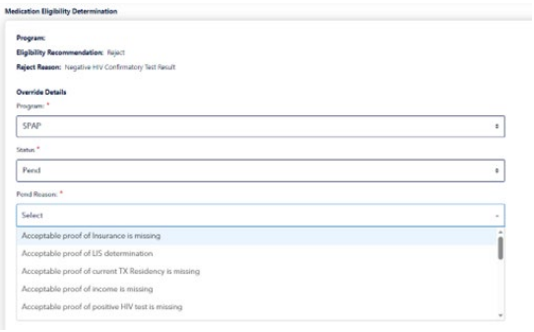
The updates for Reject Reason, Pend Reason and Denial Reason will be reflected in the following locations:

Client's Eligibility Summary page, Client's Eligibility History page, Client Eligibility Status Search Report, and the Pending Eligibility Report

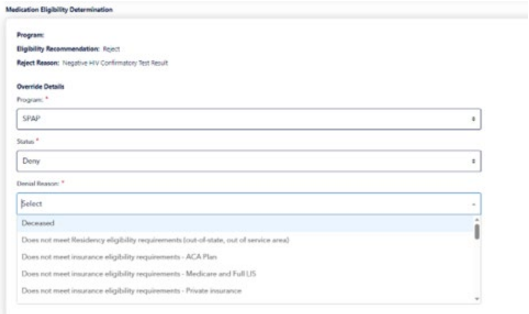
Reject Reasons for THMP Override



Pend Reasons for THMP Override



Deny Reasons for THMP Override

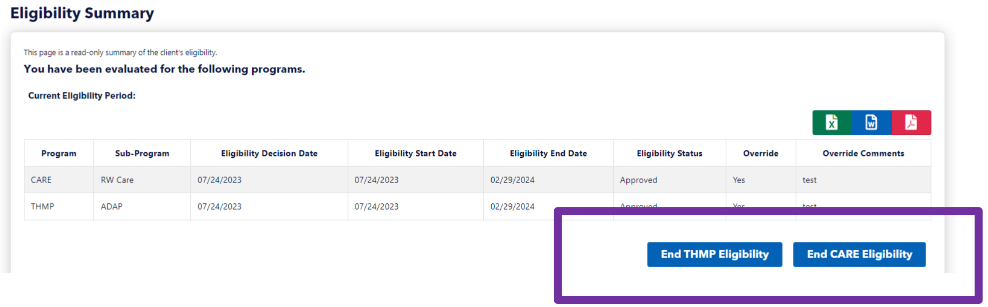


TCT users will be able to view an updated list of Denial, Pend, & Reject Reasons available when they are overriding the system recommendation for THMP eligibility so that they can easily report on this data.

Feature Updates: Sprint 8

Ability to Manually End Ongoing Eligibility

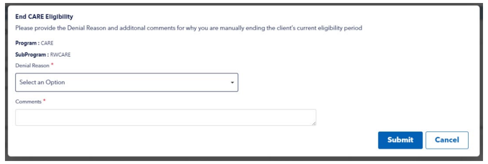
There are two new fields titled, 'End THMP Eligibility' and 'End CARE Eligibility' on the Eligibility Summary screen for Users to click on.

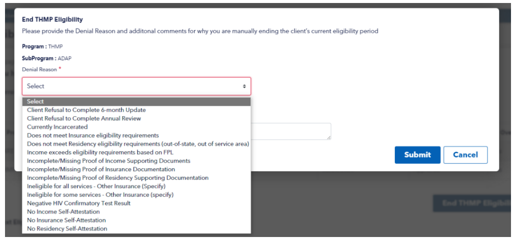


The 'End THMP Eligibility' and 'End CARE Eligibility' will only be enabled for selection when the following conditions are met:

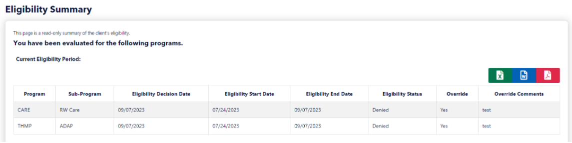
- *The role of the user attempting to end the eligibility has been given access through the Role to Screen Mapping feature*
- *The client has a current THMP eligibility record with a status of 'Approved'*

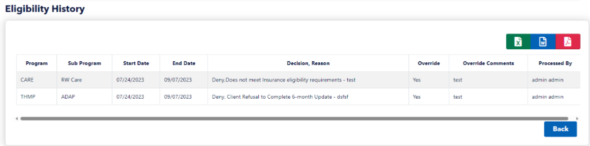
When a User clicks on 'End THMP Eligibility' or 'End CARE Eligibility', pop-up will appear, with the Denial Reason as a multi-select picklist field and a Comments mandatory free text field.

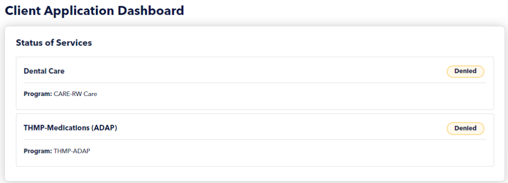




When a User clicks on 'End THMP Eligibility' or 'End CARE Eligibility', the following screens will be updated: Eligibility Summary, Eligibility History and Client Dashboard screens.







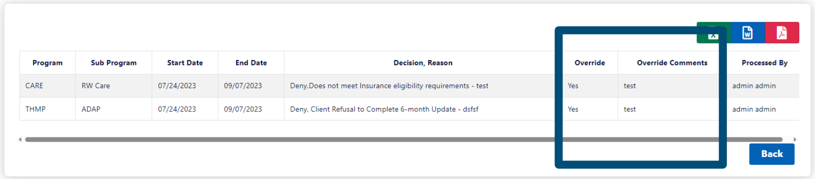
TCT Users will now have the ability to manually end a client's current THMP or CARE eligibility record, so that they can end the client's eligibility if information that makes them ineligible becomes available.

Feature Updates: Sprint 8

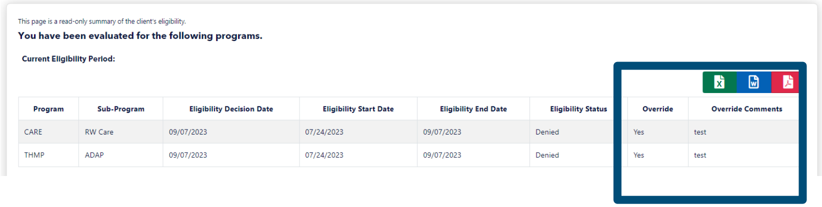
Displaying Override Comments after Eligibility is Complete

On both Eligibility Summary and Eligibility History screens, the table will have two new columns titled, 'Override' and 'Override Comments'.

Eligibility History



Eligibility Summary



If a User either accepts or overrides the system recommendation, the following screens will be updated accordingly: Eligibility Summary and Eligibility History.

TCT users will be able to view the eligibility override comments on the clients' Eligibility History & Eligibility Summary pages, so that they know why the eligibility recommendation from the system was overridden.

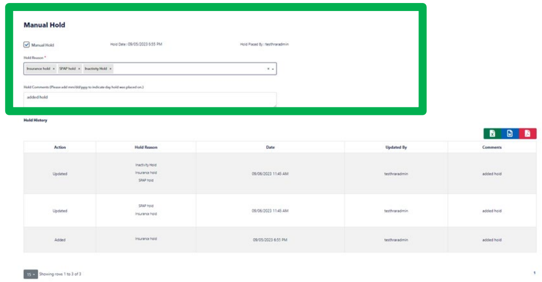
Capturing Hold History for Manual / Automatic Holds

The below are new fields on the Manual Hold screen:

- *Hold Date*
- *Hold Placed By*

Both the above fields will be auto-populated when:

- *A User places a Client on Manual Hold by indicating the user name of the individual who conducted the action*
- *The System places the Client on Automated Hold by indicating 'System' as the Hold Placed By*



A new section titled, 'Hold History' has been added to reflect updates conducted on this screen, indicating the Action, Hold Reason, Tate and timestamp, along with Updated By and Comments.

When a User removes a Client from Manual or Automated Hold or conducts an updated, the Manual Hold screen will be updated accordingly.

TCT users will be able to know who placed a client on hold (whether by a user or by the system) and when, so that they know when the client's THMP benefits were placed on hold.

Feature Updates: Sprint 8

Update Create Client Import XML to Include AIDN

The Create Client Import XML file will be updated to include a 'Agency Assigned ID Number (AIDN)' field, which is a non-mandatory field.

If a value is provided in the Agency Assigned ID Number field, the Organization ID is a required field and must be provided on the file. If an Organization ID is not provided, this will result in an exception and the following validation will display:

- *"Organization ID must be provided when an AIDN value is present so [last name], [first name] could not be created in TCT."*

If the Organization ID provided in the file is not a valid ID that exists in the system, the file will result in an exception and a new client will not be created in TCT. The following validation will display:

- *"The Organization ID provided in the file does not exist in TCT so [last name], [first name] could not be created."*

When a client has been created through the Create Client Import process and the AIDN was provided on the file, the following will occur in TCT:

On the Agency Specific Information page of the client, a record will be created with the following data:

- *Provider Agency = [system will display the name of the provider agency provided on the XML]*
- *Agency Assigned ID Number (AIDN) = [system will display the value provided in the AIDN field on the XML]*

TCT users will be able to view the Agency Assigned ID Number (AIDN) on the Create Client Import XML file so that they can associate the agency's ID for the individual with the client record in TCT.

