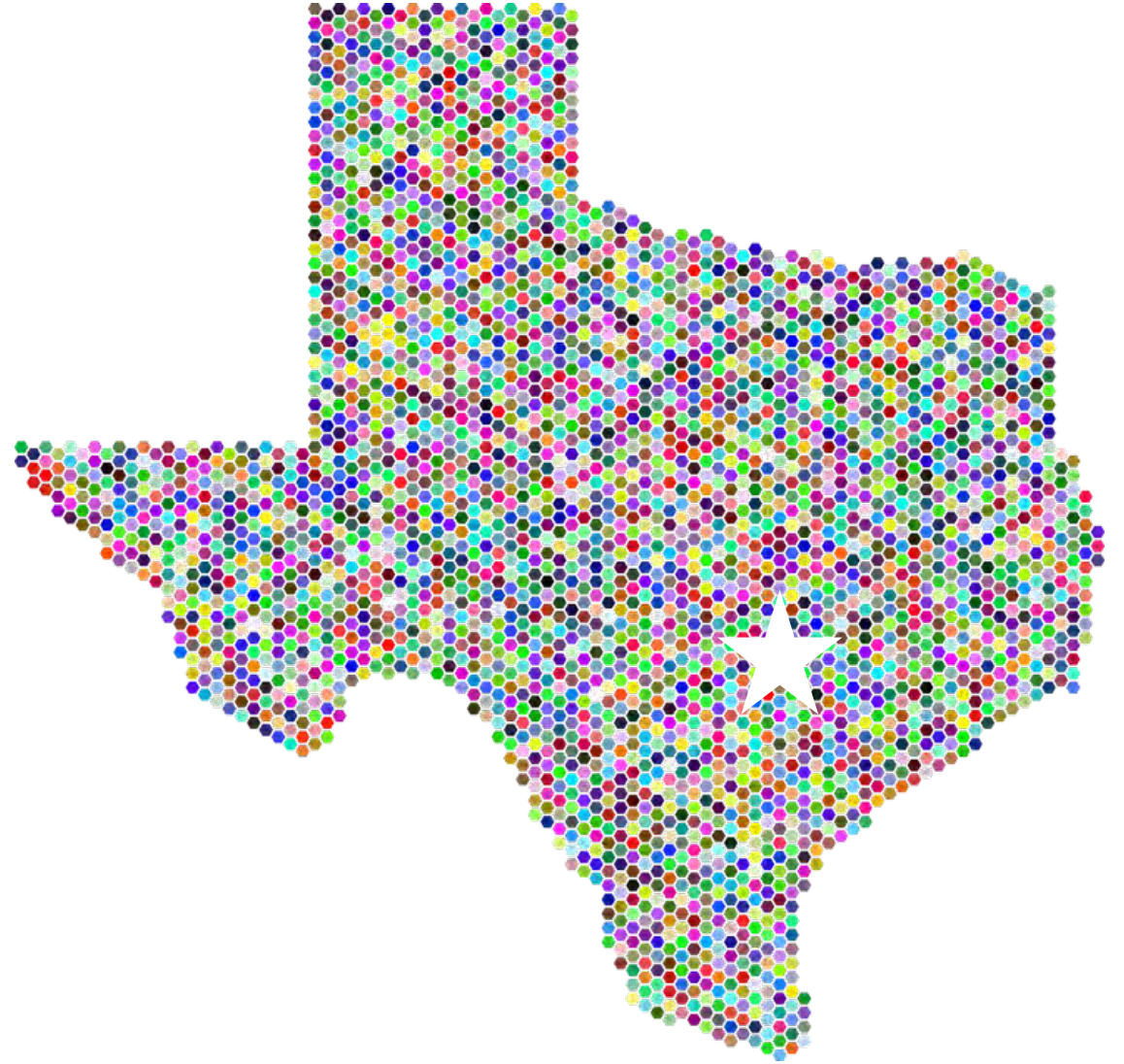


Take Charge Texas (TCT) User Engagement Session

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

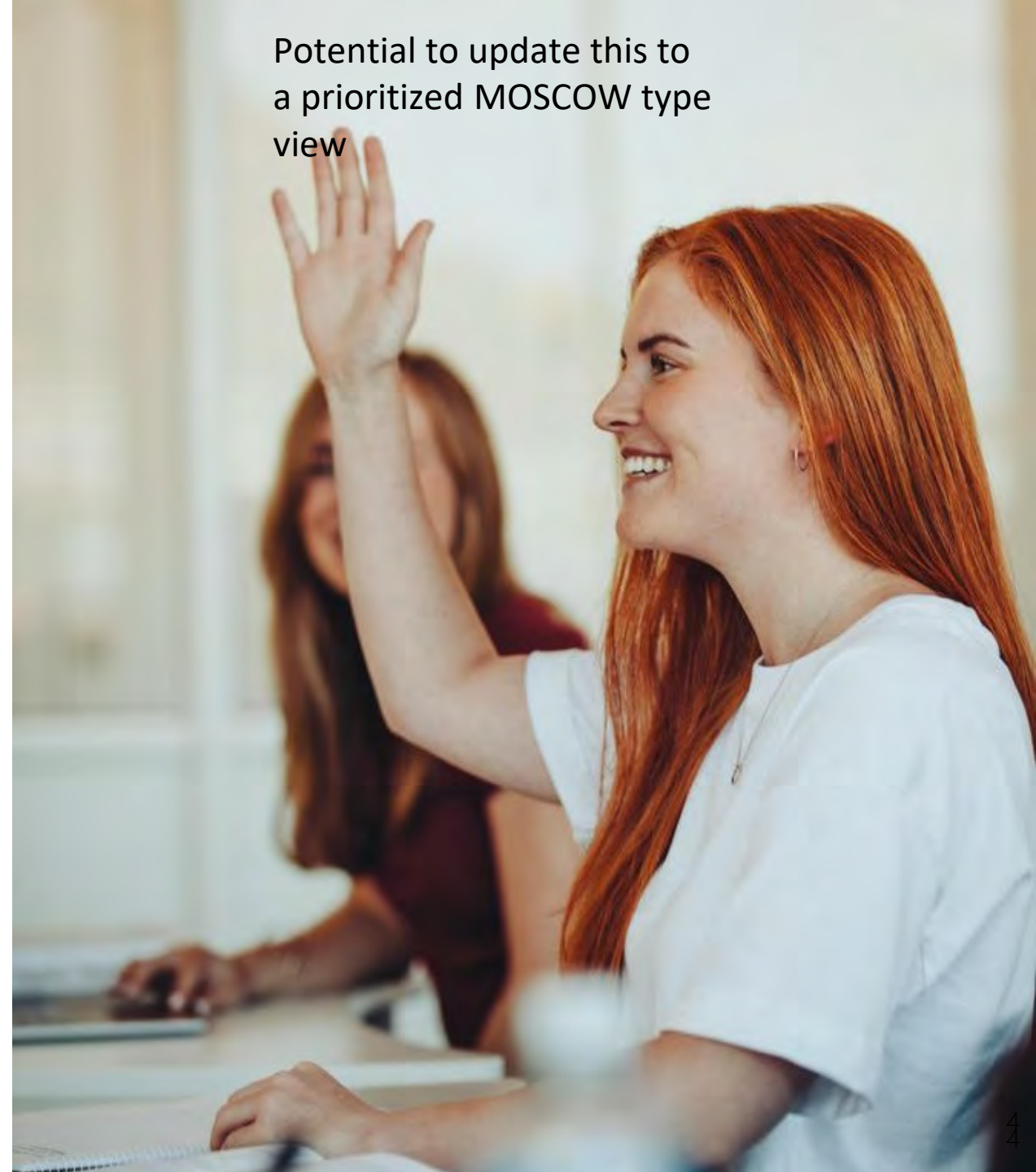
Please navigate to the following Poll Everywhere Link to respond to the following question:

If you are a **DSHS Staff member**, please use this link:
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?

Potential to update this to a prioritized MOSCOW type view



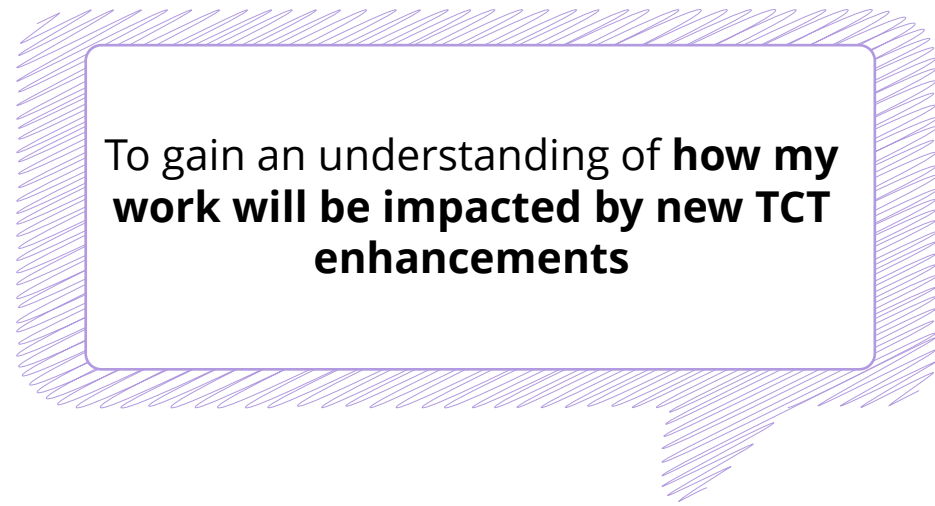
Poll Everywhere Response From Session 2

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.



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 EUCI 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

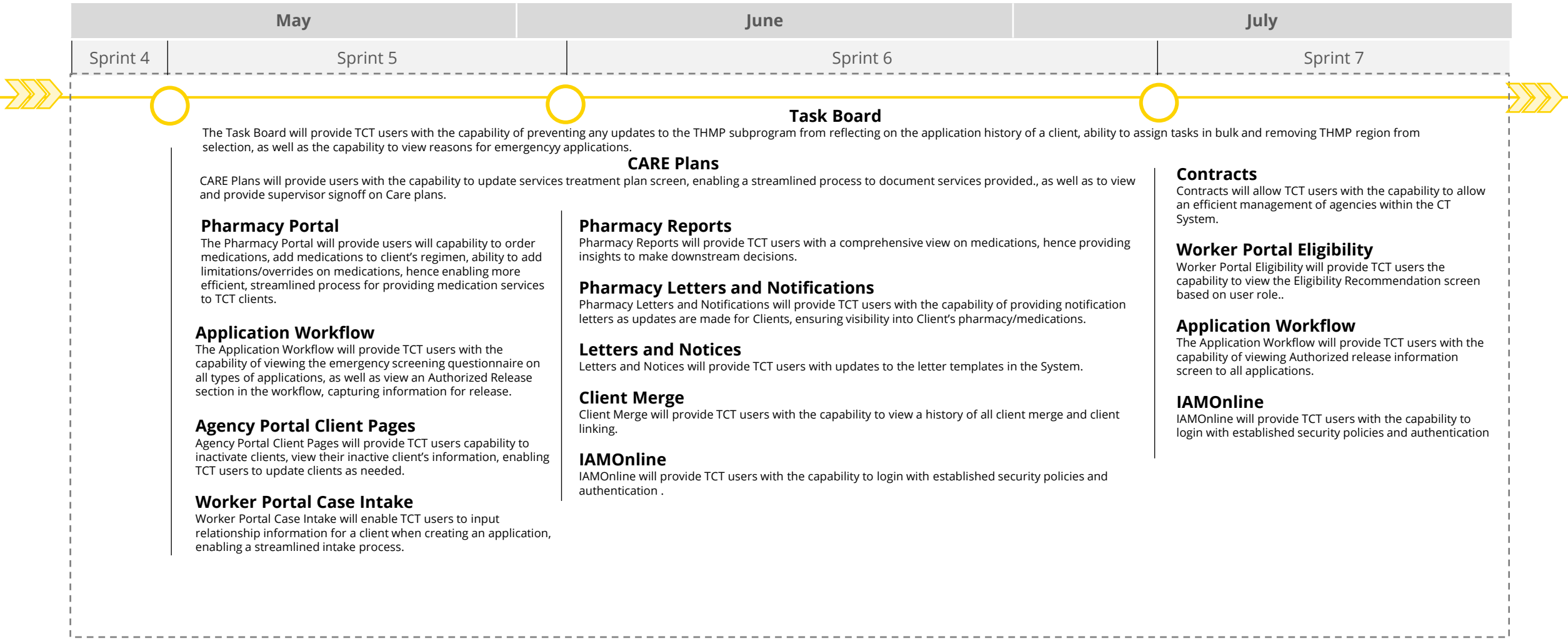
Sprint 4

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

Poll Everywhere

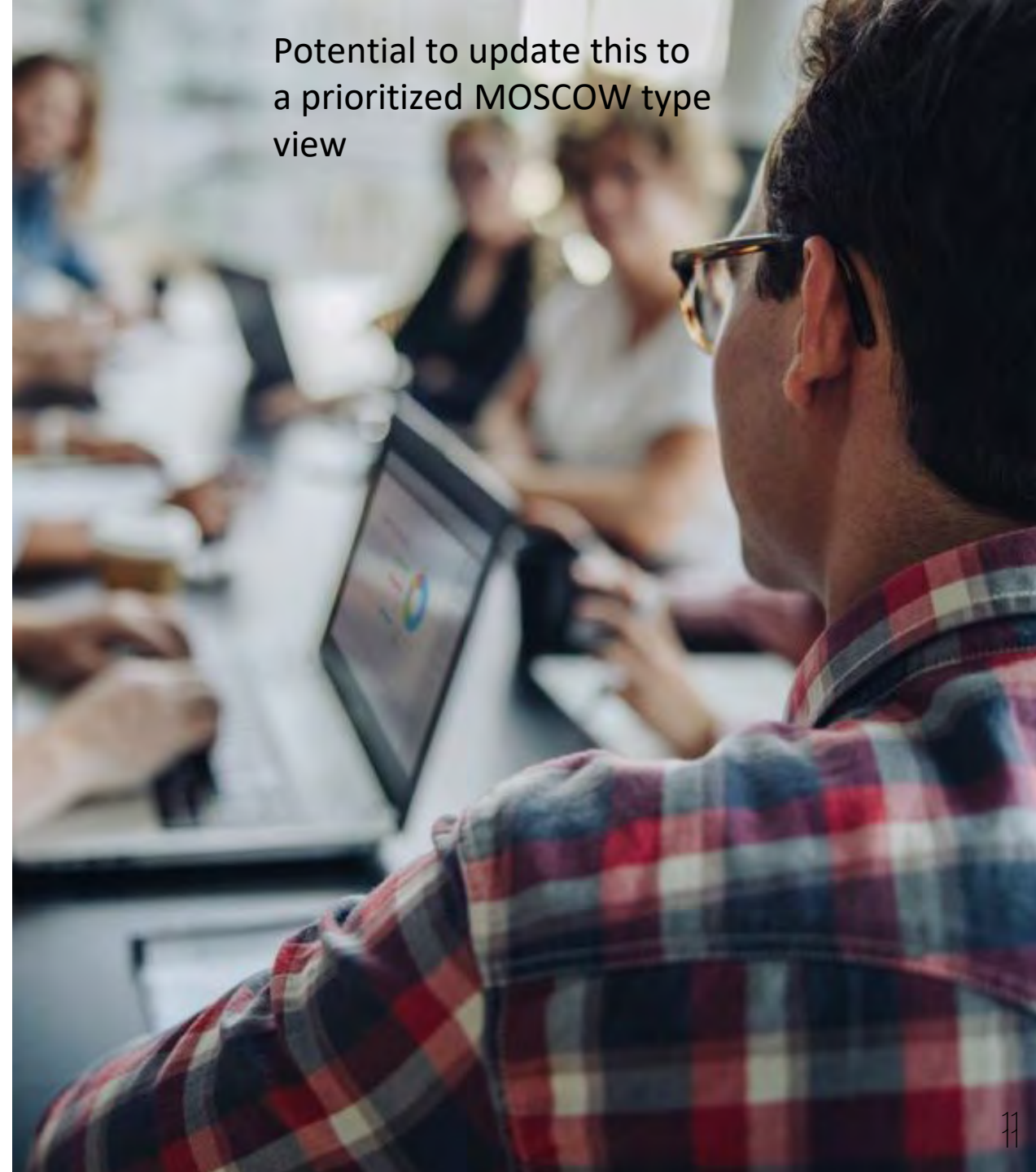
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Pollev.com/tctdshsstaff

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

How beneficial are the upcoming TCT System enhancements? Please click on the appropriate number to submit your answer.

Potential to update this to a prioritized MOSCOW type view



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

Please navigate to the following Poll Everywhere Link to respond to the following question:

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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?



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 Recommendation

Eligibility Recommendations

Household Income = --

Individual Income = 164.61% FPL

THMP Adjusted Household Income = 164.61% FPL

Remember to fill in Case notes after completing eligibility

Care Eligibility Recommendation

Run Care Eligibility

Medication Eligibility Recommendation

ADAP

Approve

Eligibility Override screen

Eligibility Override

Eligibility Determinations

Individual Income = 164.61% FPL

Household Income = 164.61% FPL

THMP Adjusted Household Income = 164.61% FPL

The system makes recommendations based on a preset set of rules. However, we understand that clients may have special situations that require exceptions to these preset rules. Please use the override feature if you have a reason to believe that the client may require an exception using the override feature, and use the comments box to enter details on why the exception is needed.

Remember to fill in Case notes after completing eligibility

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

back to dashboard

Adhoc Application Submission

Adhoc Query Builder

Alert Template Attribute

Attribute Table

Business Function

Client Link

Client Merge

Client Unlink

Client Unmerge

Income Calculation Tables

FPL Reference Table

THMP Standard Deduction

THMP Standard Deduction

The Standard Deduction amount below is for April 1-March 31 of the current year. Standard Deduction amounts are updated April 1 of each year.

Standard Deduction

12,240

Action

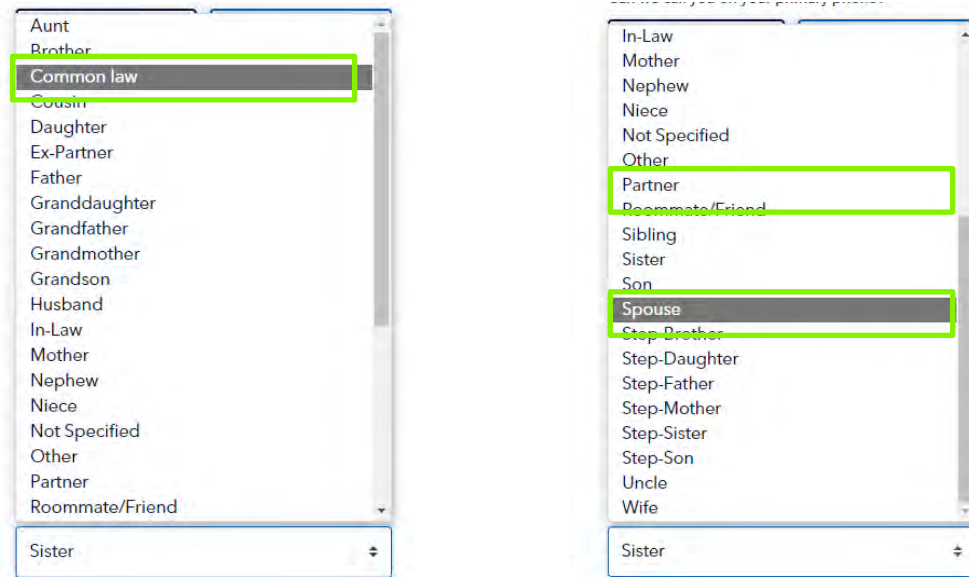
Edit

Showing rows 1 to 1 of 1

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 screenshot shows the 'Add a Household Member' pop-up form. It includes a 'Relationship' dropdown menu with 'Spouse' selected. Below this are two questions: 'Is the spouse/partner aware of the Client's HIV status?' and 'Is the spouse/partner receiving Ryan White Benefits?'. Each question has three radio button options: 'I don't know', 'No', and 'Yes'. The form also includes fields for 'First Name', 'Last Name', and 'Middle Initial'. Below these are fields for 'Date of Birth' (MM/DD/YYYY), 'Social Security Number' (XXX-XX-XXXX), and 'Gender' (a dropdown menu). At the bottom, there is a 'Medical Insurance' dropdown menu and a 'Does this person live with the Client?' question with 'No' and 'Yes' radio buttons. A 'Phone Number' field is also present at the bottom.

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

Shipping Details				
Shipment Number	Shipment Status	Pharmacy ID	Pharmacy Name	Pharmacy Address
565632532024	Shipped	89	Bluilt-Flowers Health Center Pharmacy	303 E. Overton, Dallas, TX 75216
565632532090	Shipped	132	COPC Pharmacy - Southeast Campus	9202 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
148	GENVOYA (30/btl)	Genyoaya	150:200:10	mg	TAB	30	1	04/19/2023	Client shows active Medicaid, THMP Staff must verify	418158	Munoz Olivera, Eilly	08/27/1965	
												Reason for Override	
												☐	
												☒	
												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 *

ROFERON A IV

Generic Name *

Interferon Alfa IV

Abbr

ROFRN A IV

Drug Class

OI

Drug Group

ROFRN

Drug Code

25

Dosage Strength *

18

Form *

INJ PWD F/

Measure

MU/VIAL

AEV? *

No

Count As *

0

NDC Code *

00004201109

Pkg Size *

3 ML

Package *

VIAL

Cost

\$ 98.88

Min Day Supply *

30

Max Per Month *

30

Medicaid Clients Eligible

Yes

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
01	ROFONAS	Roferon	300	ME	CAP (S/LAT)	1	2	30		Drugged	Is this client new to this Drug?	Select

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
01	ROFONAS	Roferon	300	ME	CAP (S/LAT)	1	2	30		Drugged	Is this 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	---	Drop
ZIDOVUDINE (60/bt)	Zidovudine (AZT)	300	MG	TAB	1	30		CONV0118		Approved	05/05/2023	---	Drop
NORVIR OS (240 ml/bt)	Ritonavir OS	80	MG/ML	LIQ	1	40		CONV0117		Approved	04/24/2023	---	Drop
ZIDOVUDINE OS (240 ml/bt)	Zidovudine OS (AZT)	10	MG/ML	SYRUP	1	30		CONV0117		Override Pending	---	---	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 screenshot shows the 'Drug Details' form with various fields for drug information. A green rectangular box highlights the 'Drug Requires Override?' field at the bottom, which is currently set to 'Yes'.

Drug Requires Override populated as 'Yes' message

The screenshot shows the 'Add Prescribed Drug' screen. A red banner at the top contains the message: 'No drug found matching your search criteria.' Below the banner, there are input fields for drug name, strength, and other details, and a 'Search' button.

Drug Equivalent or Conflict with another drug message

The screenshot shows the 'Add Prescribed Drug' screen. A red banner at the top contains the message: 'No drug found matching your search criteria.' Below the banner, there are input fields for drug name, strength, and other details, and a 'Search' button.

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

The screenshot shows the 'Add Prescribed Drug' form with a red error banner at the top stating: 'The total number of drugs prescribed exceeds the 4 ARV limit. Please remove one or more drugs from the regimen.' Below the banner, the form has fields for 'Drug Code', 'Trade Name', and 'Generic Name'. A 'Submit' button is at the bottom right. A message below the form says 'No drugs found matching your search criteria.'

Message after submission of override request

The screenshot shows the 'Add Prescribed Drug' form with a green success banner at the top stating: 'The drug has been added to the client's drug regimen. Please click the back button to return to the regimen list.' Below the banner, the form has fields for 'Drug Code', 'Trade Name', and 'Generic Name'. A 'Submit' button is at the bottom right.

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'

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?
GENVOYA (50/50)	Genvoxa	150/200/10	MG	TAB	4	30		CONV0118		Approved	06/15/2023		<button>Drop</button>
EVOTAZ (50/50)	Evotaz (atazanavir/cobicistat)	300/150	MG/MG	TAB	2	30		CONV0118		Override Pending			<button>Drop</button>

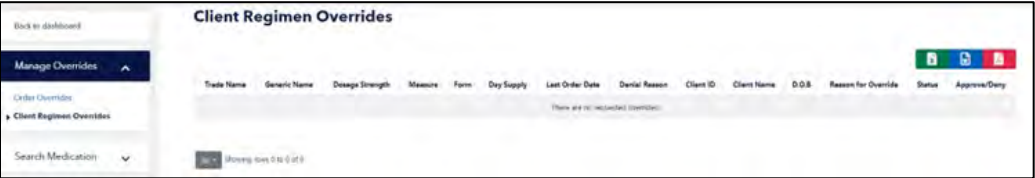
TCT Users will be able to request an override on the system on the Add Prescribed Drug screen, so that they can prescribe medications and add them to their client's drug regimen.

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 As	Day Supply	Dosage Frequency	TX MD/DO License #	New Drug to Client?	Status	Approval Date	Regimen Drop Date	Drop?
GENVOYA (30/60)	Genfoya	150/200/10	MG	TAB	4	30		CONV0118		Override Pending	---	---	Drop
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.

Prescribed Drugs

TX MD/DO License # Doctor Name: [Search Doctor](#) [Add Prescription](#)

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?
GENVOYA (30/60)	Genfoya	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.

Prescribed Drugs

TX MD/DO License # Doctor Name: [Search Doctor](#) [Add Prescription](#)

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?
GENVOYA (30/60)	Genfoya	150/200/10	MG	TAB	4	30		CONV0118		Approved	05/15/2023	---	Drop
EVOTAZ (30/400)	Evotaz (atazanavir/rosovudine)	300/150	MG/MG	TAB	2	30		CONV0117		Override Denied	---	05/15/2023	Drop

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

Duplicate Client Identification

Search Criteria

Client Name: Client ID: County:

Agency Or Administrative Agency:

Client ID 1	Client ID 2	Client Name 1	Client Name 2	Client DOB 1	Client DOB 2	Client SSN 1	Client SSN 2	Client ITIN 1	Client ITIN 2	TexasDLID 1	TexasDLID 2	Matching Field	Matching Value	Client1 County	Client2 County	Select
100832	100831	Adigal Theodore	Madia Levi	10/22/1991	10/22/1991	512515151	512515151					PrimaryPhone/Number	5125120001	Bear	Bear	☐ Yes ☐ No
101430	101429	client Doe	client Doe	01/01/1980	01/01/1980	512123456	512123456					PrimaryEmail	aaaa@gmail.com	Anderson	Anderson	☐ Yes ☐ No
100896	100904	Emma Joshua	Ava Christopher	10/29/1991	10/29/1991	512515151	512515151					PrimaryPhone/Number	5125120001	Bear	Bear	☐ Yes ☐ No

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*.

