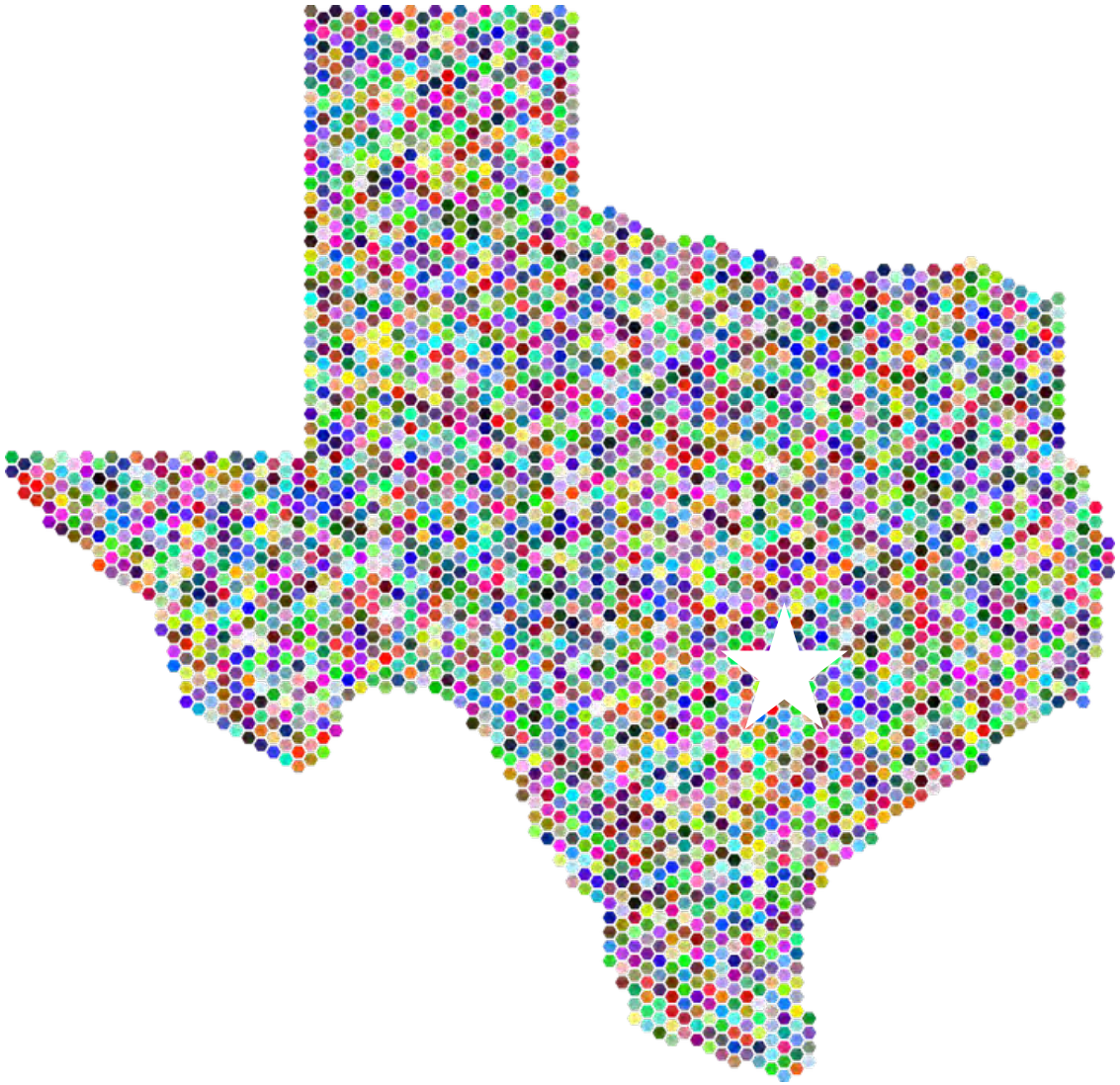
Take Charge Texas (TCT) User Engagement Session

June 28th, 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

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Agenda

1. Introduction & Overview of Objectives
2. TCT Survey Response
3. TCT Roadmap
4. System Overview: New TCT Features
5. Gathering Your Feedback
6. 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!

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Poll Everywhere

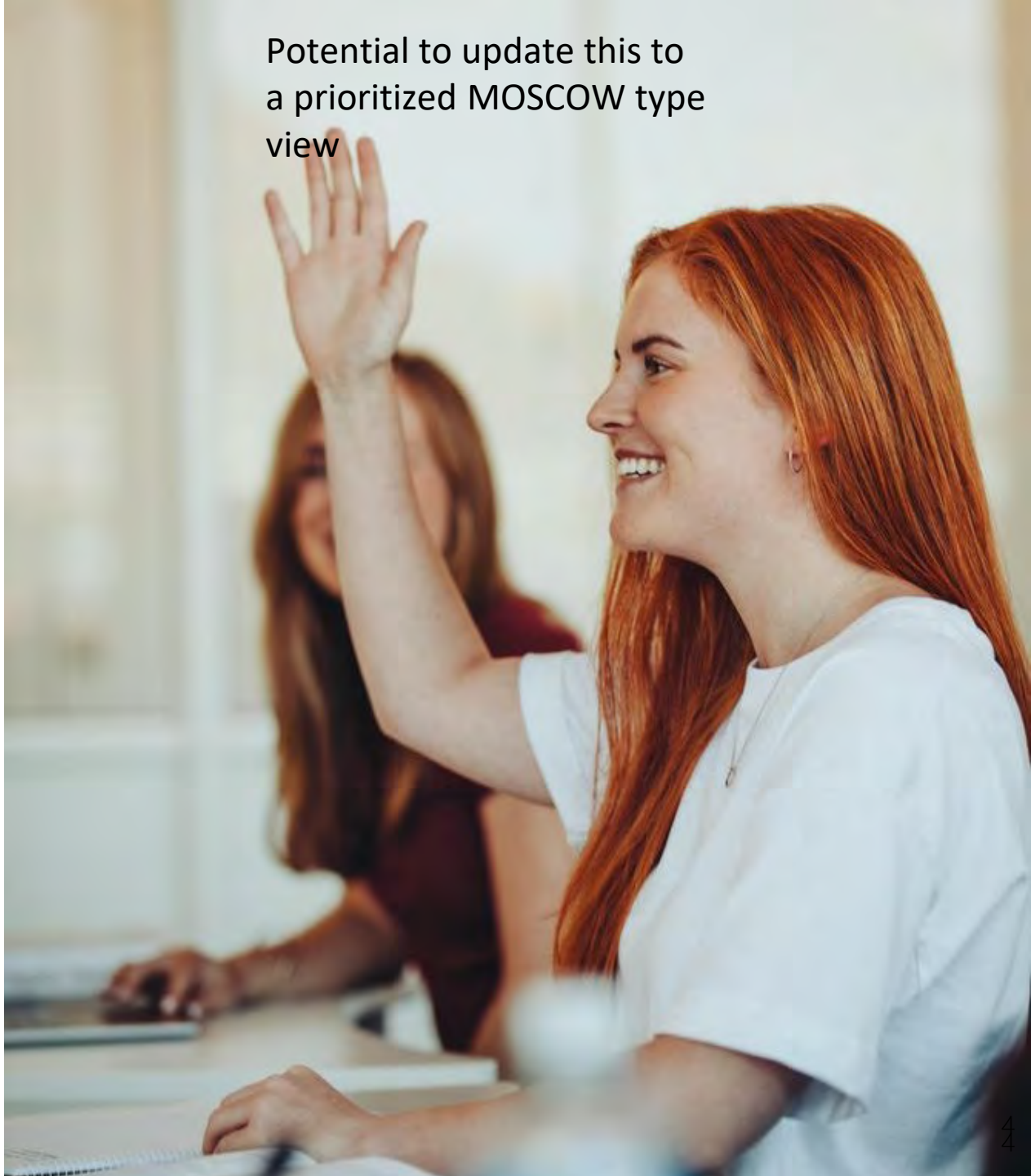
Poll Everywhere

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

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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 SURVEY ANALYSIS

Discuss the feedback received from the TakeChargeTexas Survey.

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.

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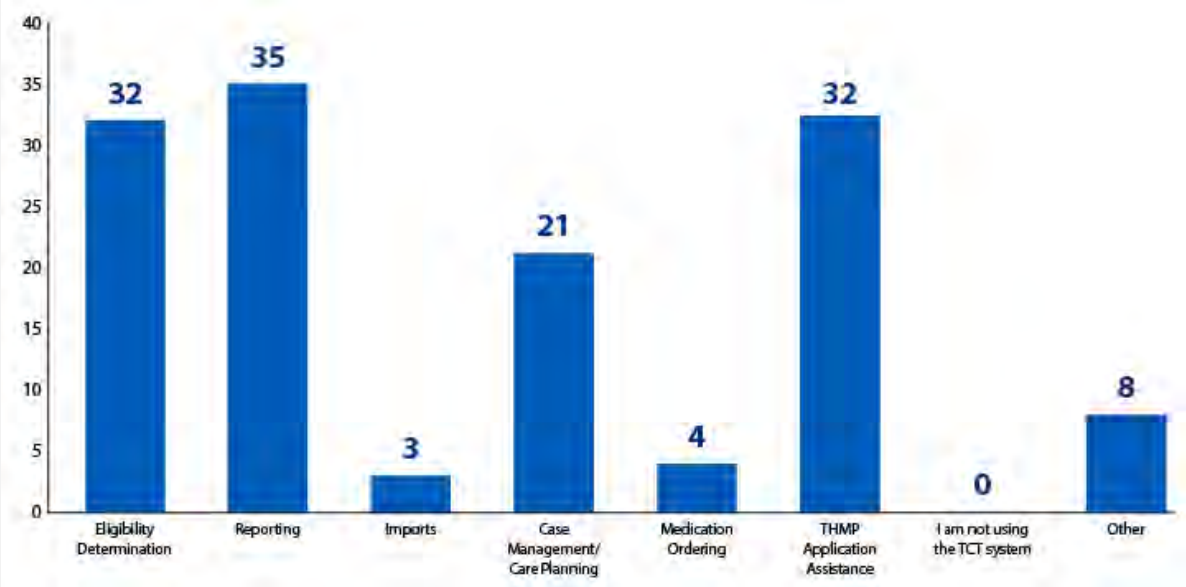
TakeChargeTexas Survey

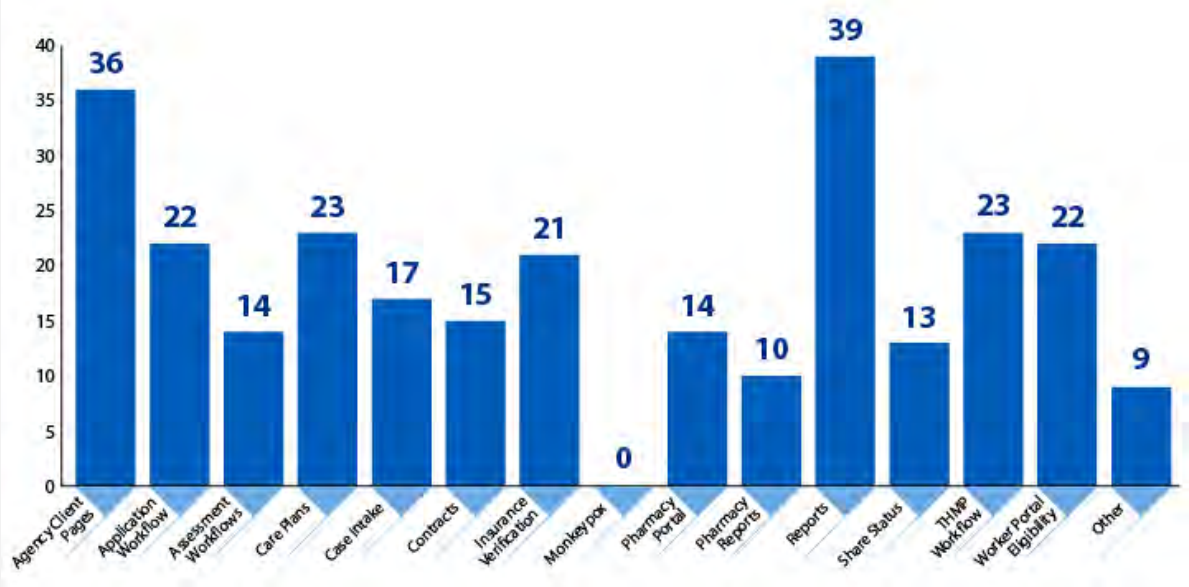
TakeChargeTexas Survey

Our team had shared a brief survey to gather additional feedback, suggestions, or recommendations for the TakeChargeTexas application. Your anonymous responses are collated below.

How are you using the TCT system today?



What enhancements would improve challenges you face with using the TCT system?



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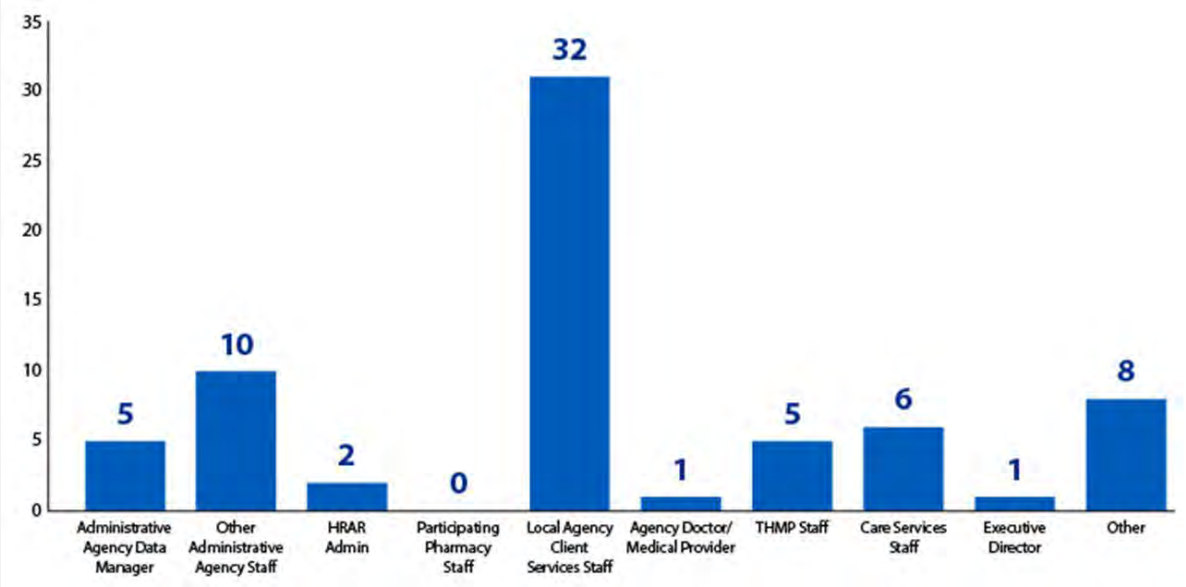
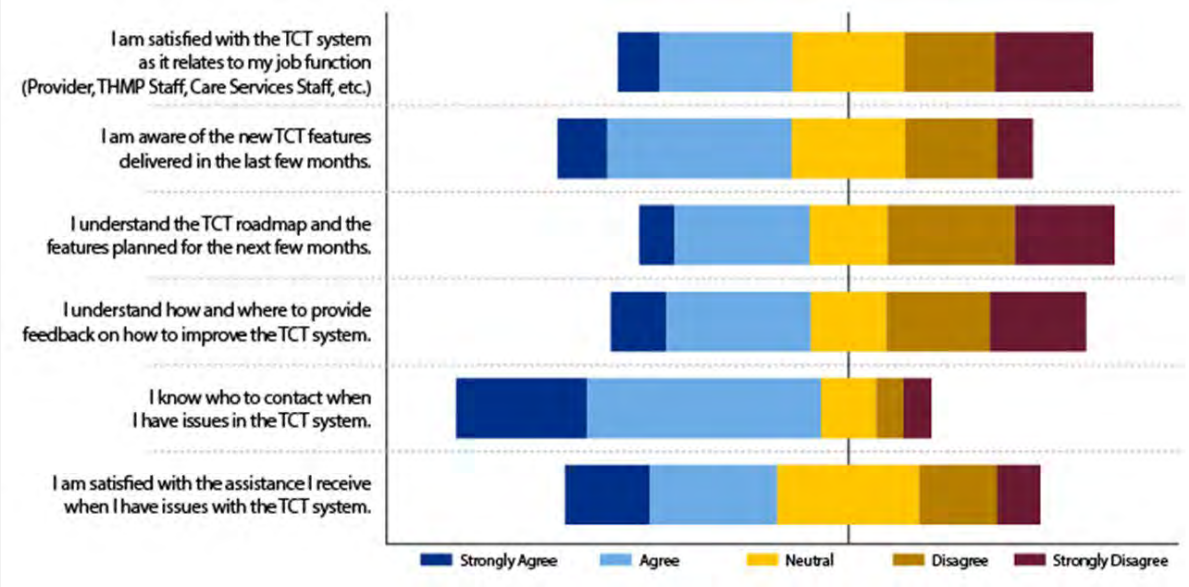
TakeChargeTexas Survey

Our team had shared a brief survey to gather additional feedback, suggestions, or recommendations for the TakeChargeTexas application. Your anonymous responses are collated below.

TCT Survey Respondents' Role Function



TCT Survey Respondents' Ranking



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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

Sprint 5

Focused on the establishment of pharmacy site creation as well as pharmacy order creations. Provided additional features in maintaining client status activities

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

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

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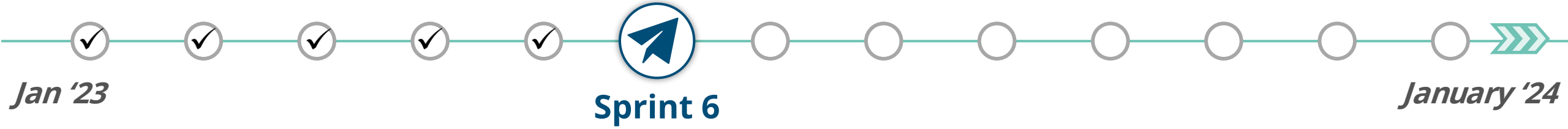
Project Plan: In Progress Features

The graphic below represents the features & user stories our team is currently consuming for Sprint 6.



Focused on creating Pharmacy reports as well as notification letters for Pharmacy related updates on Client profiles. Provides additional immunization report capabilities.

We are here

- 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

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Project Plan: Upcoming Features

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

*

Sprint 7 7/10 – 8/4	Sprint 8 8/7 – 9/1	Sprint 9 9/4 – 9/29	Sprint 10 10/2 – 10/27
★ Task Board	● Agency Portal Client Pages	●★ Application Workflow	◆ Share Status
●◆ Application Workflow	●★ Eligibility	★ Eligibility	◆ Interfaces
★ Pharmacy Letters		◆★ Reports	◆ New Client
● Agency Portal Client Pages			◆ Eligibility
● Client Merge			
◆ Mpox			

*

Sprint 11 10/30 – 11/24	Sprint 12 11/27 – 12/22	Sprint 13 1/2 - 1/26
●★ Agency Portal Client Pages	◆ Reports	◆ Reports
◆ CARE Plans		●
◆ Contracts		★
● Create & Manage Account		
● Client Search		

Key

- ★ THMP
- ◆ CARE
- ● General

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

Poll Everywhere

Poll Everywhere

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

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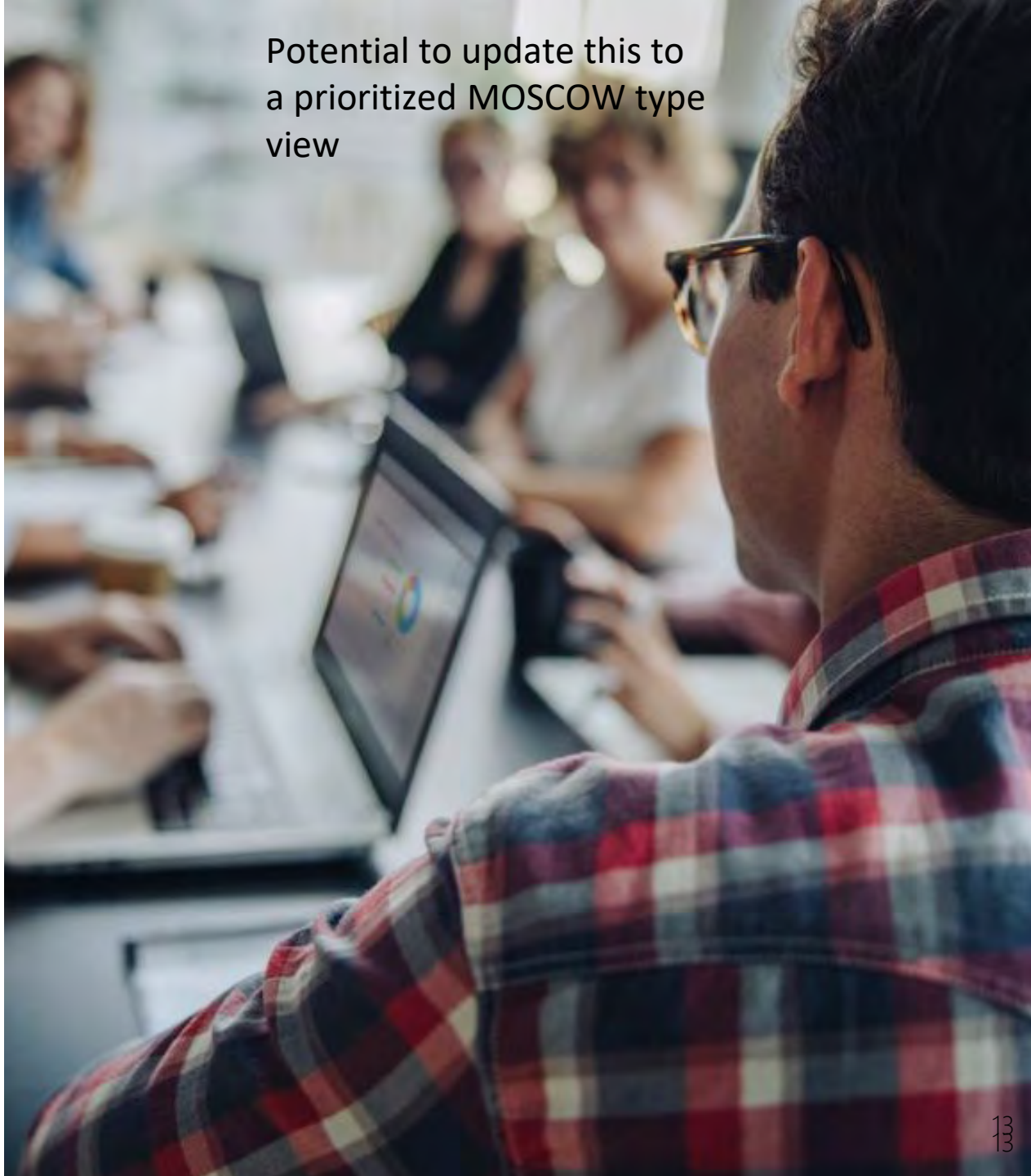
PollEV.com/tctdshsstaff

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

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



Potential to update this to a prioritized MOSCOW type view

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System Overview: **New** TCT Features

Live Demonstration of TCT Features

TCT Features Video Presentation

- Sprint 5: Agency Assigned ID Numbers (AIDN)
- Sprint 5: Updates to Permissions for Inactivating Clients & Access to Profiles of Inactive Clients
- Sprint 5: Display Additional Client Results on Order Dashboard
- Sprint 5: Preventing Updates to THMP Subprogram on Task Board from Updating Application History
- Sprint 5: Emergency Screening Questions for All Applications & COBRA Emergency Applications
- Sprint 5: Open Order Enhancements
- Sprint 5: Creation & Assignment of Secondary Sites

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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?

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How to Provide Feedback to TCT?

The **TakeChargeTexas Portal**, is a system of 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!

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Next Steps

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, July 19th .

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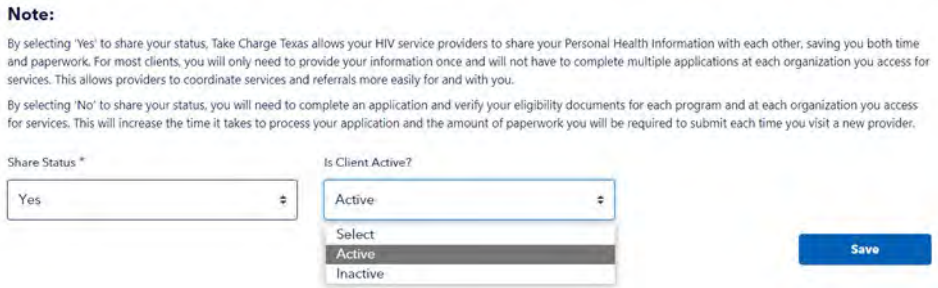
Thank You!

System Overview: **New** TCT Features

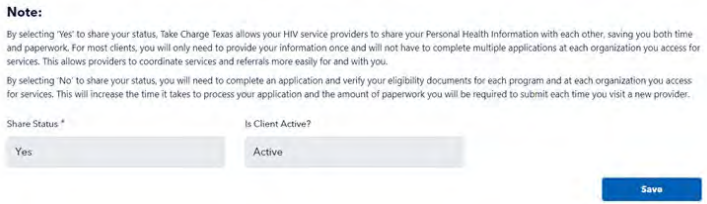
Feature Updates: Sprint 5

Update Permissions for Inactivating Clients

Specific roles will have the ability to change the Status of a Client.



User roles outside of those listed in the 'Update' will not have the ability to change the Status of a Client as seen below.

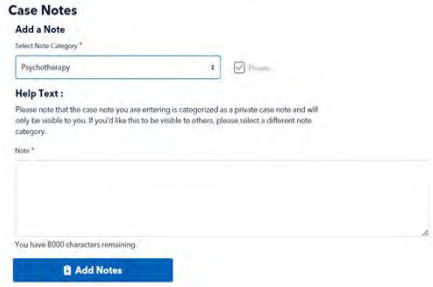


The ability to inactivate clients has been restricted to the following roles: TCT Admins, AA Data Managers, ADAP Data ManAdmins, and DSHS Data Team.

Additionally, Admins can now change these roles as needed in the future.

Allow Access to Profiles of Inactive Clients

Only the Case Notes section will have editing permissions, providing users with the ability to continue adding notes for Inactive clients.



TCT Users will have read-only access to the profiles of Inactive clients so they can retrieve/refer to information as needed, and access past medical history of client.

The only page that is available for editing on Inactive clients is Case Notes within the Case tab, so that TCT users can continue to enter notes on Inactive clients.

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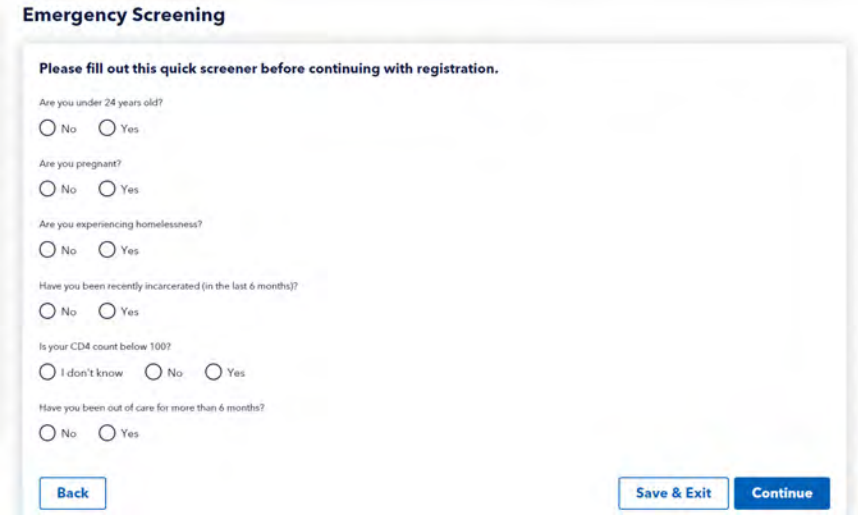
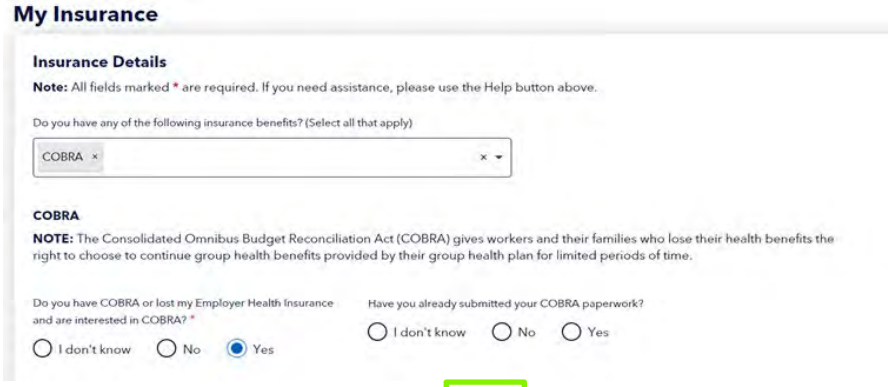
Feature Updates: Sprint 5

Addition of Emergency Screening Questionnaire Page to All Applications



The following application types will display the Emergency Screening questionnaire: Referral, Self-Attestation, Re-certification, and Change Request (in addition to New Applications).

If Client has selected 'Yes' for the question of 'Do you have COBRA or lost my Employer Health Insurance and are interested in COBRA?', then the Emergency App column on the Task Board would be populated as 'Yes'.



Client ID	Client Name	Birth Date	Task Type	Programs	THMP Subprogram	Emergency App	Date Submitted	CARE Status	THMP Status	HOPWA Status	Agency	THMP Region
400007	Ernest Tobias	06/02/1977	Application	CARE,THMP,HOPWA	ADAP	Yes	12/20/2021	—	Complete	Submitted	4801 - Panhandle AIDS Support Organization	Unassigned
400001	John Scott	05/18/1997	Application	CARE,THMP,HOPWA	ADAP	Yes	12/17/2021	Submitted	Complete	Submitted	4808 - South Plains Community Action Association Part b	San Antonio/Austin Area

TCT users will be able to view the Emergency Screening questionnaire screen on all application types to determine if it needs to be expedited.

Additionally, if clients indicate they have COBRA insurance on their application, this will now display as an Emergency Application on the Task Board.

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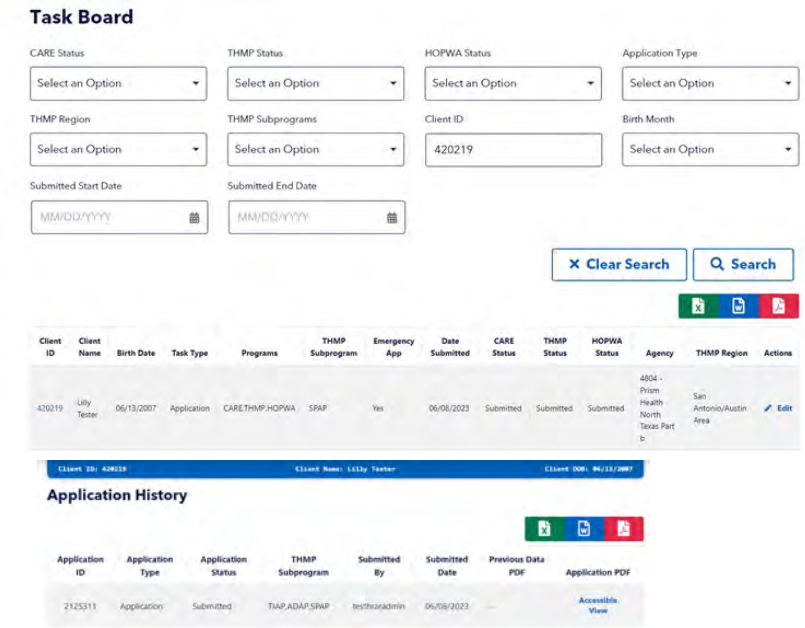
Feature Updates: Sprint 5

Prevent Updates to THMP Subprograms on Task Board from Updating Application History



When a TCT User updates the THMP Subprogram on the Task Board, this change will not be reflected on the Application History so that users can access the client's original selection on their application.

Agency Assigned ID Numbers (AIDN)

When adding new provider agencies on Agency Specific Information page, users can enter the Agency Assigned ID Number (AIDN) for each provider agency.

An additional field titled 'EUCI ID' is added in for the Client as a read-only text at the top of the Agency Specific Information page.

TCT Users will be able to capture a client's Agency Assigned ID Number (AIDN) across different providers so that clients can be searched using this data.

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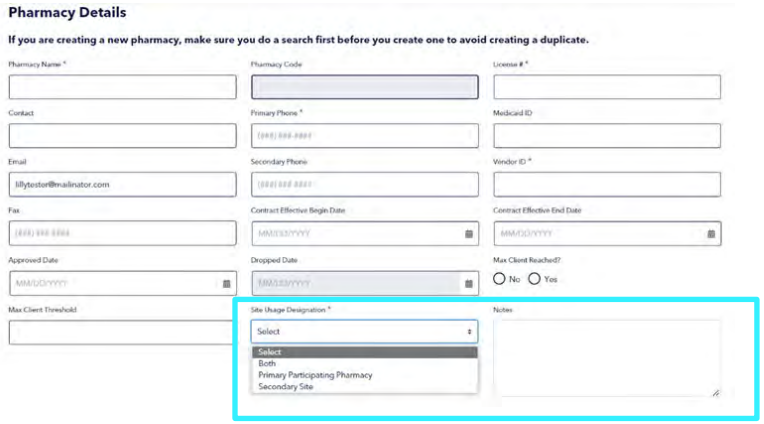
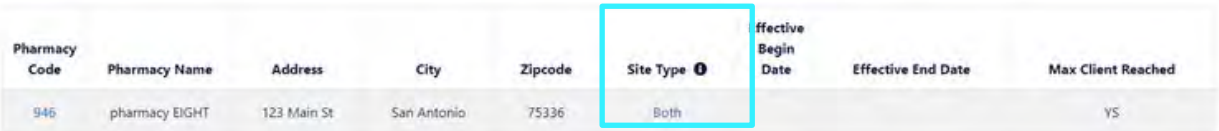
Feature Updates: Sprint 5

Creation of Secondary Sites

TCT Admins can indicate the Site Usage Designation of a pharmacy, as well as add notes for each pharmacy on the Pharmacy Details page.

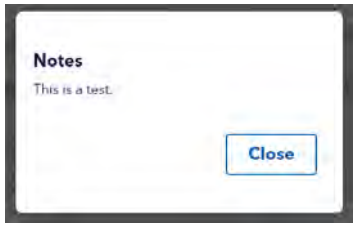


If the value of Site Type is 'Secondary Site' or 'Both', as indicated by TCT Admins, the populated data will appear as a hyperlink for users.



Pharmacy Code	Pharmacy Name	Address	City	Zipcode	Site Type	Effective Begin Date	Effective End Date	Max Client Reached
946	pharmacy EIGHT	123 Main St	San Antonio	75336	Both			YS

Upon selecting the hyperlink, a pop-up will appear with the data saved on the Pharmacy Details page for the Notes field.



TCT Admins will be able to indicate whether a Pharmacy is a 'Primary Participating Pharmacy', 'Secondary Site' or Both.

Once selected, all users can view this Site Type information, in addition to Notes, when searching for pharmacies.

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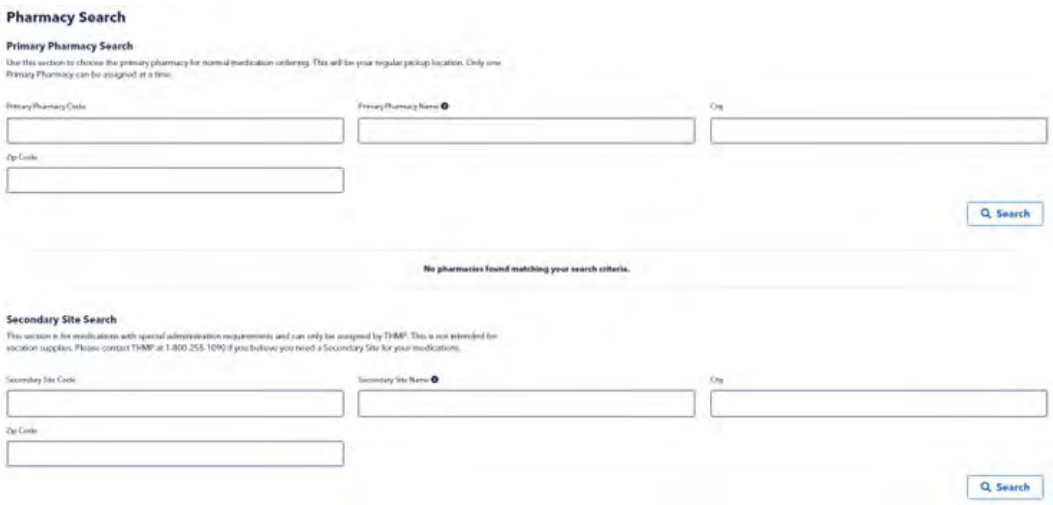
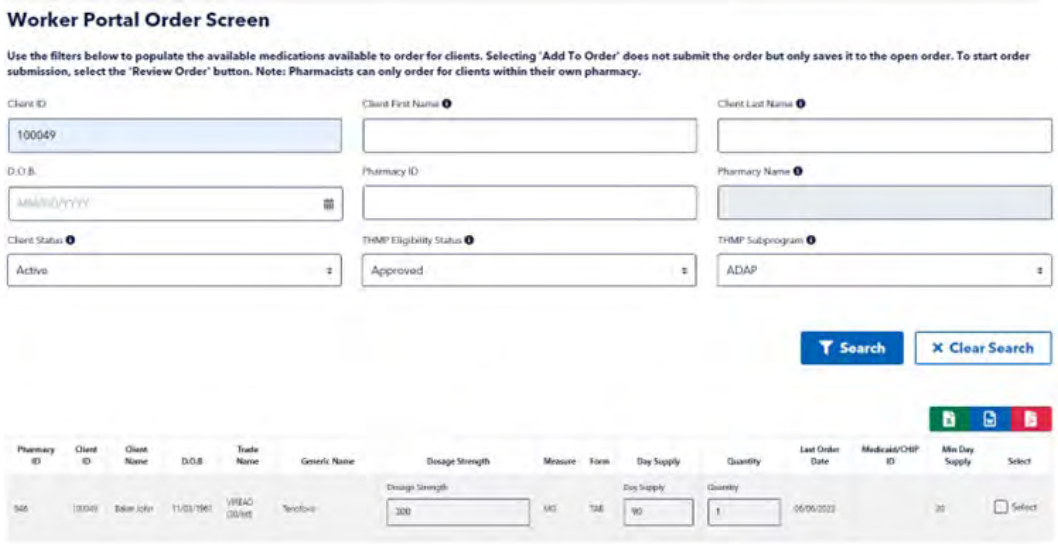
Feature Updates: Sprint 5

Assigning Secondary Sites to Clients

On the Assign/Change Pharmacy page of the client dashboard, two separate Pharmacy Search sections have been created to search and assign both Primary Pharmacies and Secondary Sites to clients.





A secondary site can only be assigned to a client when a drug that requires an override is displayed on a client's drug regimen with 'Approved' status.

Once assigned, the Primary Pharmacy and Secondary Site will reflect at the top of the client's Assign/Change Pharmacy page, as well as the client's HIV Medication Information page.

On the Worker Portal Order Screen, drugs that require an override will display the Pharmacy ID of the client's assigned Secondary Site. If a drug does not require an override, it will display the Pharmacy ID of the client's Primary Pharmacy.

HRAR Admin, ADAP Data ManAdmin, or ADAP Order Processor will be able to assign a secondary site to clients so that they can order specialty medications from a restricted set of specialty locations.

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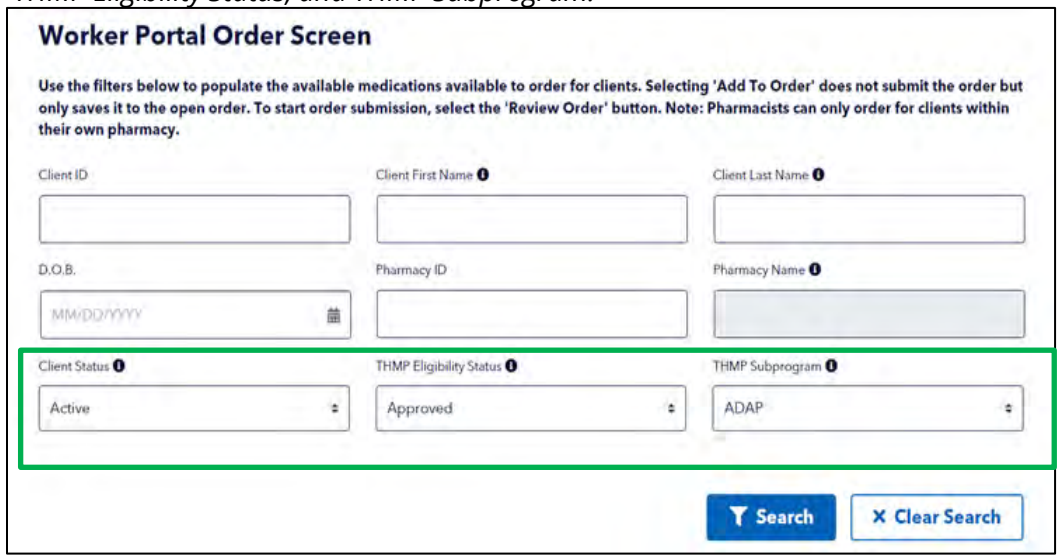
Feature Updates: Sprint 5

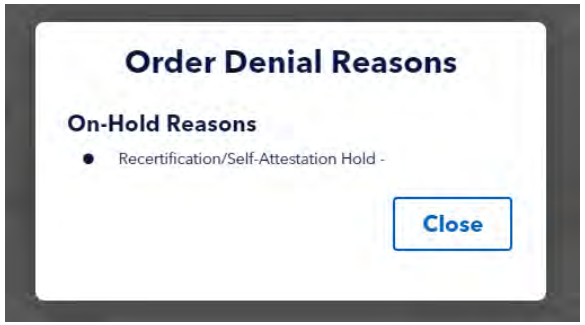
Display Additional Client Results on Order Dashboard

There are new search filters available on the Worker Portal Order Screen: Client Status, THMP Eligibility Status, and THMP Subprogram.



Users will not have the ability to select clients for orders using the Select column unless the client is Active, ADAP-approved, and not on a manual hold.

If the client does not meet these conditions, a hyperlink will be displayed in the Select column, titled 'Order Denial Reasons' which will show the reason why the client is not eligible to order medications.



TCT users will be able to view all clients on the Worker Portal Order Screen when placing medication orders, regardless of whether they are eligible to receive medications, so that Users can easily determine why a client is not able to order medications.

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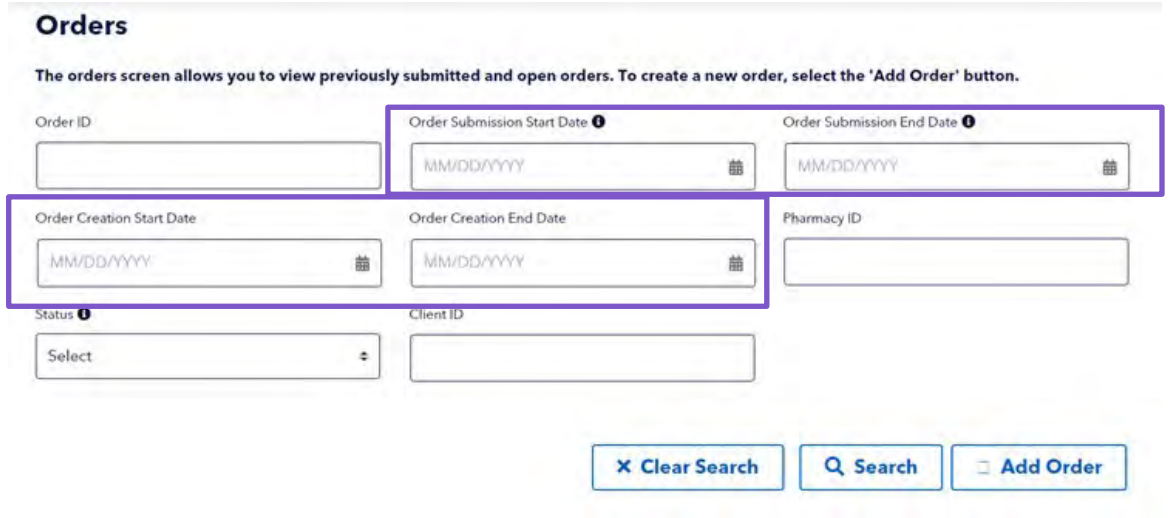
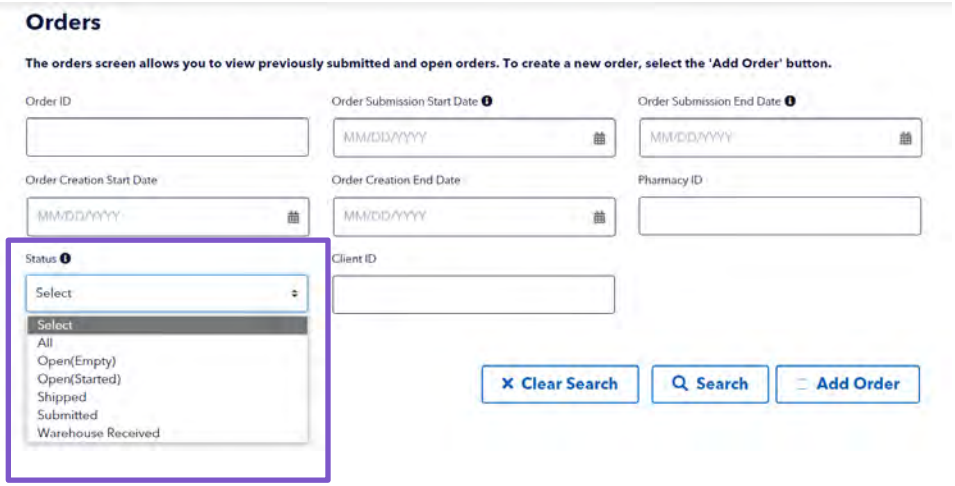
Feature Updates: Sprint 5

Open Order Enhancements





TCT Users can easily search for Open Orders on the Orders page, in order to return to these orders at a later time and ensure they are submitted to the warehouse.

The following new statuses have been created to enhance the search capability:

Open (Empty) orders indicate there are no line items associated with the order.

Open (Started) orders indicate there are line items tied to the order, but the order has not yet been submitted

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