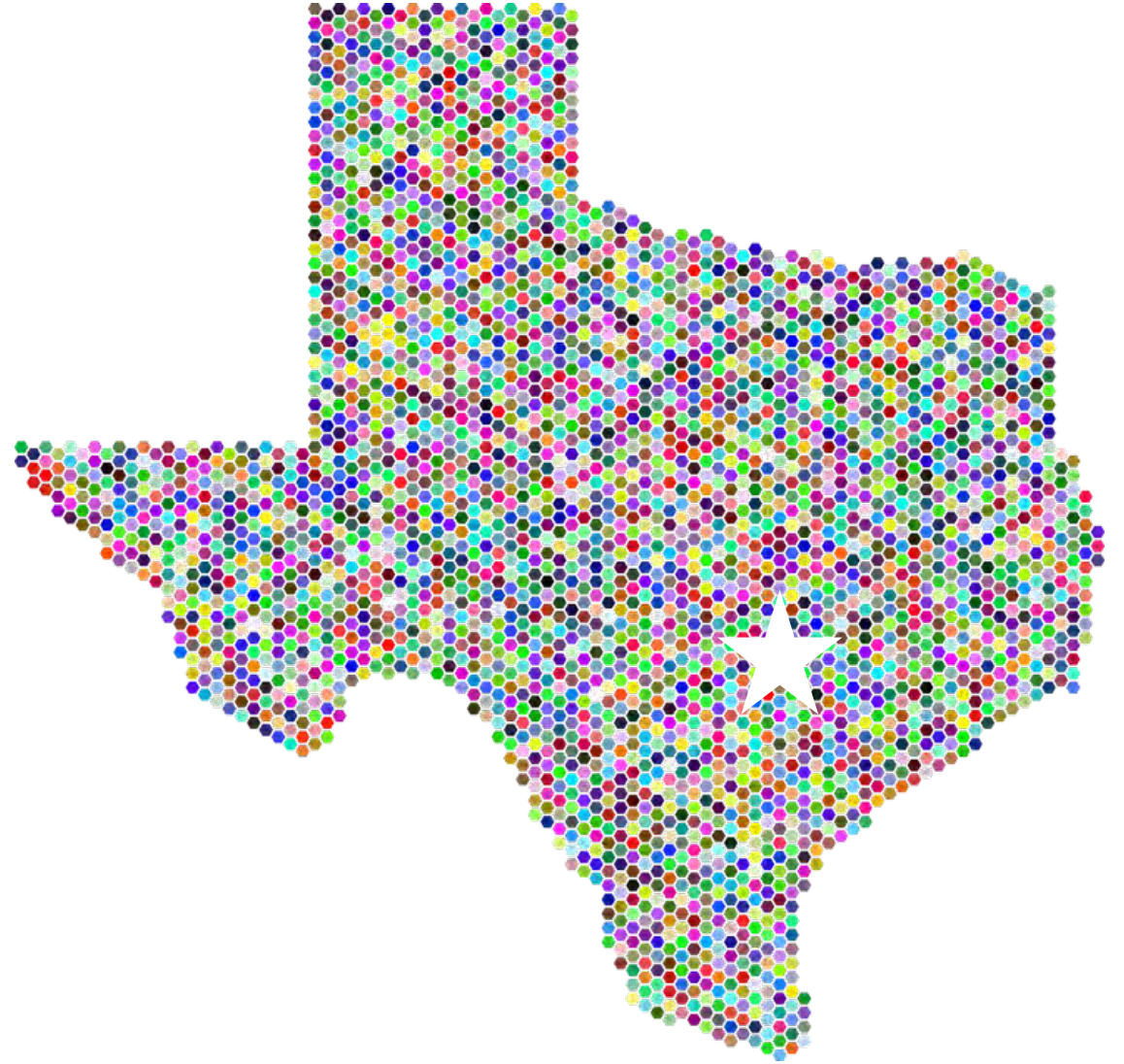


Take Charge Texas (TCT) User Engagement Session

July 26th, 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

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

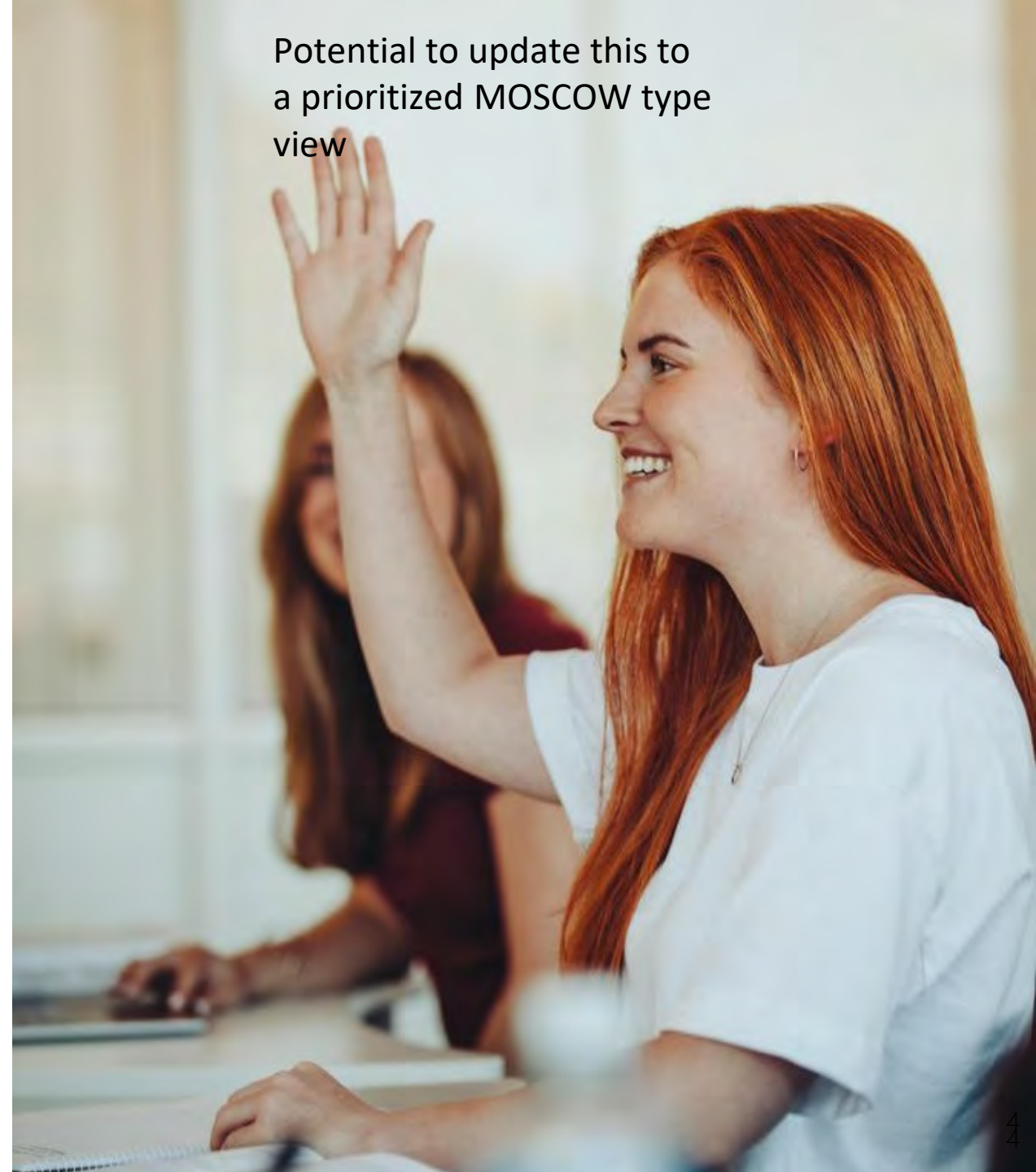
Please navigate to the following Poll Everywhere Link to respond to the following question:

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



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.

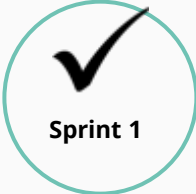
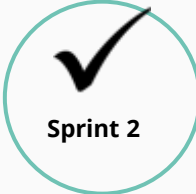
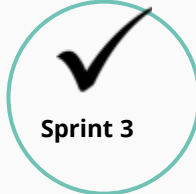
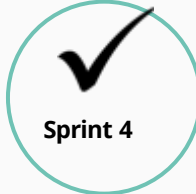
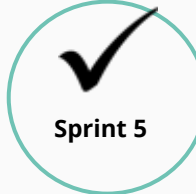
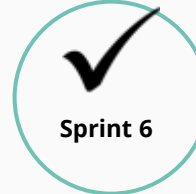


TCT Roadmap



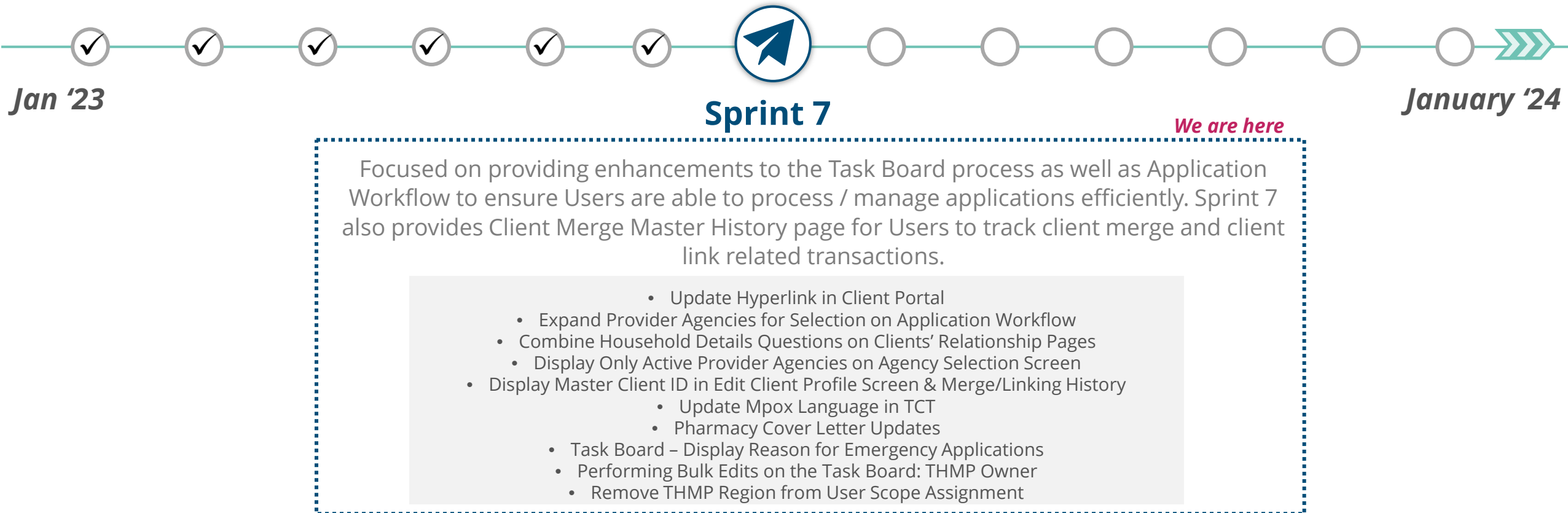
Project Plan: Successfully Completed Features

The graphic below represents the features & user stories our team has developed since initiation of Enhancements in January 2023.

 Sprint 1	 Sprint 2	 Sprint 3	 Sprint 4	 Sprint 5	 Sprint 6
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	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	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	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: 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 Relationships - Standard Deduction Reference Table Management - Standard Deduction THMP Adjusted Household FPL	Focused on the establishment of pharmacy site creation as well as pharmacy order creations. Provided additional features in maintaining client status activities - 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	Focused on creating Pharmacy reports as well as notification letters for Pharmacy related updates on Client profiles. Provides additional immunization report capabilities. - 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

Project Plan: In Progress Features

The graphic below represents the features & user stories our team is currently consuming for Sprint 7.



Project Plan: Upcoming Features

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

*	Sprint 8 8/7 – 9/1 ● Agency Portal Client Pages ●★ Eligibility	Sprint 9 9/4 – 9/29 ●★ Application Workflow ★ Eligibility ◆★ Reports	Sprint 10 10/2 – 10/27 ◆ Share Status ◆ Interfaces ◆ New Client ◆ Eligibility
*	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

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

Poll Everywhere

Poll Everywhere

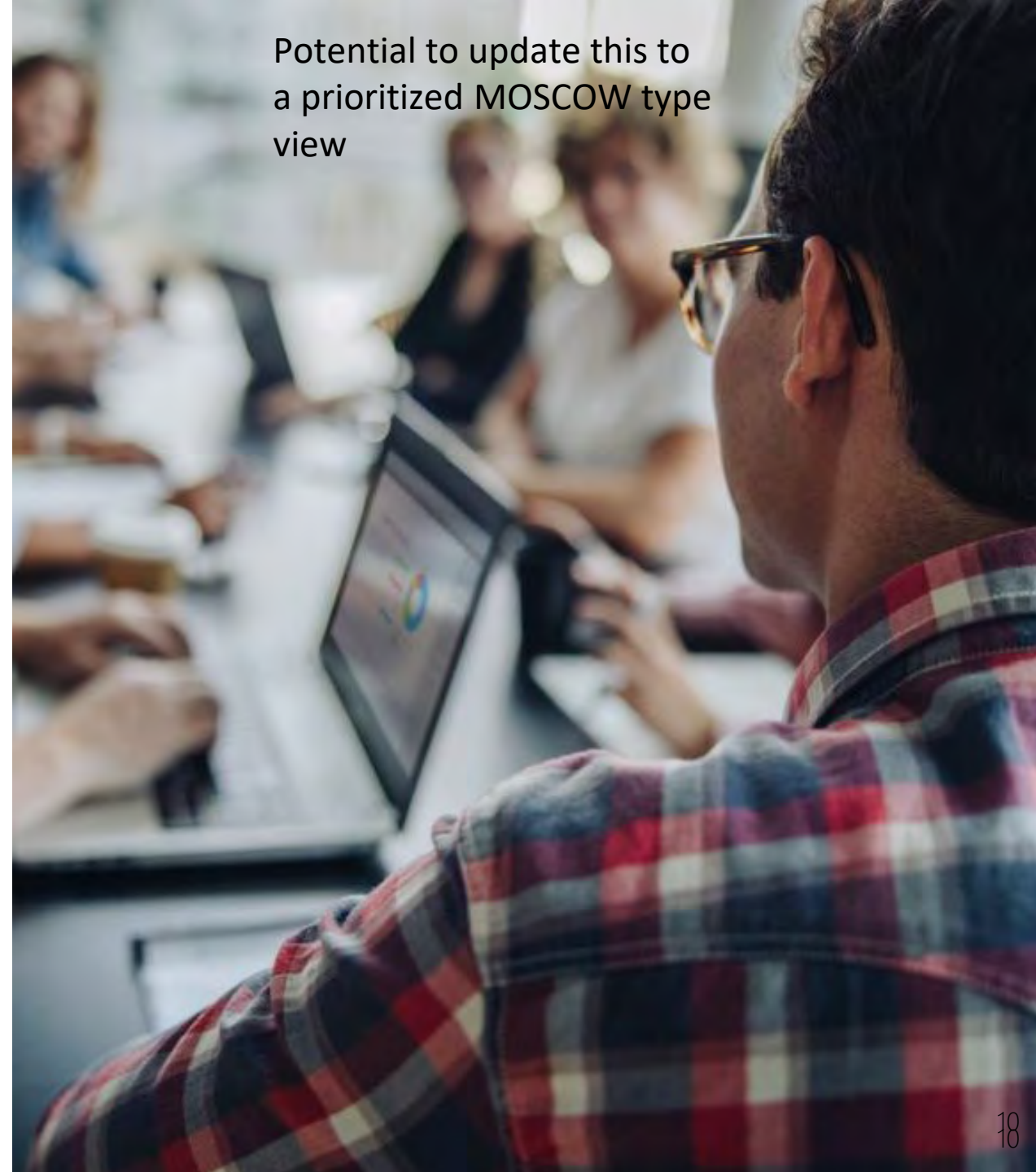
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If you are a **DSHS Staff member**, please use this link:
PolIEV.com/tctdshsstaff

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

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

Potential to update this to a prioritized MOSCOW type view



System Overview: **New** TCT Features



Live Demonstration of TCT Features

TCT Features Video Presentation

- [Sprint 6: Shingrix Vaccine Enhancements](#)
- [Sprint 6: Exclude ADAP Clients on Hold From the Clients Coming Up For Renewal Report](#)
- [Sprint 6: Generating Letters by Client ID](#)
- [Sprint 6: Updates to the Care Plan](#)
- [Sprint 6: Update Client Letter Templates & Update Letter Triggering Conditions](#)
- [Sprint 6: Client/Pharmacy Update Letter Pharmacy Copy](#)
- [Sprint 6: Monthly Pharmacy Orders Report](#)
- [Sprint 6: Client Order Count by Medication Report](#)



Gathering Your Feedback



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?



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, August 24th.

Thank You!

System Overview: **New** TCT Features



Feature Updates: Sprint 6

Shingrix Vaccine Enhancements

Zoster (shingles) value in the Immunization Type dropdown has been replaced with Shingrix Dose 1 and Shingrix Dose 2. Upon clicking on Shingrix Dose 1 or Shingrix 2, there will be a new mandatory field, titled 'Source'.

The screenshot shows the 'Add Immunization Detail Record' form. The 'Immunization Type' dropdown is set to 'Shingrix Dose 1'. Below it, the 'Source' field is highlighted with a red box, indicating it is a new mandatory field.

The screenshot shows the 'Add Immunization Detail Record' form. The 'Source' dropdown is set to 'State'. Below it, the 'Administering Agency' field is highlighted with a red box, indicating it is a new mandatory field.

If State is selected for Source field, there would be a field titled 'Administering Agency' which will appear for User to populate.



The Administering Agency dropdown consists of all Active Provider Agencies within TCT System.

In the Reports tile, 'Monkeypox Report' has been updated to 'Immunization Report'.

The screenshot shows the 'Immunization Report' form. The 'Immunization Type' dropdown is set to 'Shingrix Dose 1'. Below it, the 'Administering Agency' field is highlighted with a red box, indicating it is a new mandatory field.

The following updates have been added on the Immunization Screen:

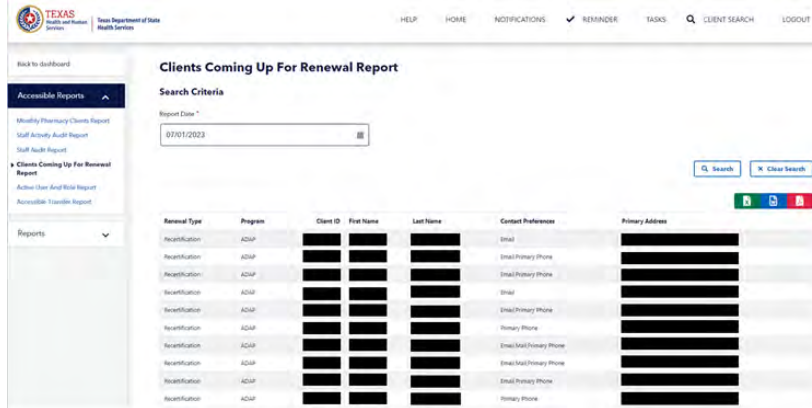
- Addition of optional field titled 'Administering Agency' if 'State' is selected for Source field
- Addition of Administering Agency column to the results table (this column will be only be populated when the Immunization Type is 'Shingrix Dose 1 or Shingrix Dose 2')

TCT Users will have the ability to gather more data on the Shingrix vaccine as service providers may receive doses in the upcoming months.

Feature Updates: Sprint 6

Exclude ADAP Clients On Hold from the Clients Coming Up for Renewal Report

The Clients Coming Up for Renewal Report, which is a scheduled report, will exclude active ADAP clients with a Recertification/Self-Attestation Hold (regardless of whether the hold was automatic or manual). The report will continue to display active clients currently approved for SPAP, TIAP or ADAP services, as long as an ADAP client is not on a Recertification/Self-Attestation Hold.

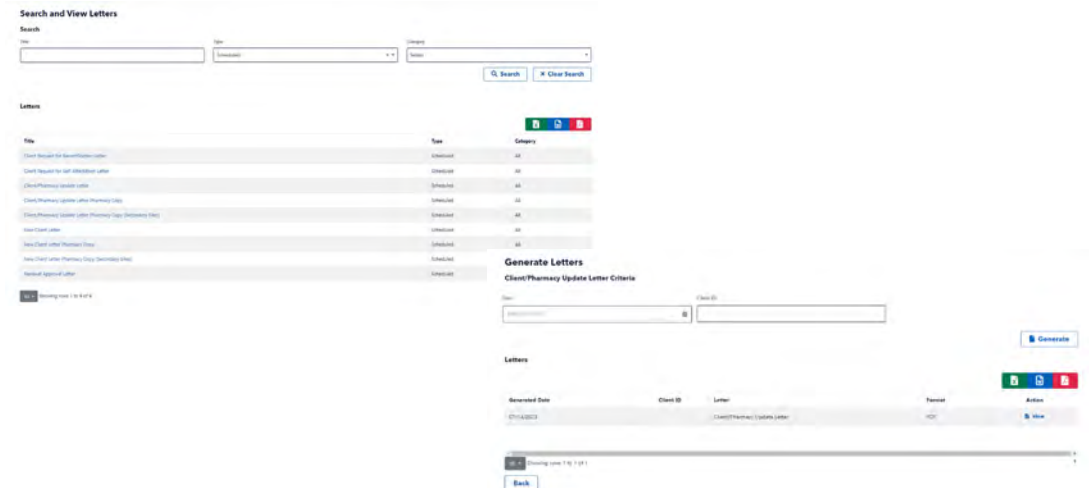


TCT Users will be able to view the Clients Coming Up for Renewal Report excluding ADAP clients with a Recertification/Self-Attestation hold. Therefore, clients who have not submitted an application requesting THMP services, will not receive a renewal application / notification.

Generating Letters by Client ID

The Letters tile provides search capability for the scheduled letters in the TCT Portal. Users can select the letter type of their preference. Users can search by the date and/or by the client ID which they looking to obtain the generated letters for.

When searching by Client ID, the Client ID column in the results table will be populated accordingly. When searching by Date, the Client ID column will remain blank, as letters may have been generated for multiple clients on that particular date.



TCT users will be able to search for previously generated letters by Client ID, hence having the ability to re-print the letter if needed.

Feature Updates: Sprint 6

Update Care Services Treatment Plan Screen

Care Plan screen has tool tip to guide Users. Clicking on the Add Care Plan Goal will provide a pop-up to appear, whose status by default, will be In Progress.

Care Plan

A care plan is required for clients receiving services through Ryan White Part-B funded Medical and Non-Medical Case Management. A care plan should be updated with outcomes of interventions and revised or amended in response to changes in the client's life circumstances or goals. Tasks, referrals, and services should be updated as they are identified or completed, and not at set intervals. Regular case notes or progress notes should describe the progress toward meeting care plan goals by utilizing the "Case Notes" screen in Take Charge Texas or other approved electronic health records. Case managers should focus on no more than three goals at a time in order to not overwhelm clients with tasks.

Care plans must be updated at minimum every 6 months, with documentation that all required elements (problem statement/need, goals, interventions, responsible party, and timeframe) have been reviewed and, if appropriate, revised.

Care Plan Goal Name: + Add Care Plan Goal

Add Care Plan

Care Plan Goal Name: Problem Statement (Need):

Status: + Add Care Plan Goal Cancel

Care Plan

A care plan is required for clients receiving services through Ryan White Part-B funded Medical and Non-Medical Case Management. A care plan should be updated with outcomes of interventions and revised or amended in response to changes in the client's life circumstances or goals. Tasks, referrals, and services should be updated as they are identified or completed, and not at set intervals. Regular case notes or progress notes should describe the progress toward meeting care plan goals by utilizing the "Case Notes" screen in Take Charge Texas or other approved electronic health records. Case managers should focus on no more than three goals at a time in order to not overwhelm clients with tasks.

Care plans must be updated at minimum every 6 months, with documentation that all required elements (problem statement/need, goals, interventions, responsible party, and timeframe) have been reviewed and, if appropriate, revised.

Care Plan Goal Name: + Add Care Plan Goal

Care Plan

Care Plan Goal Name	Problem Statement (Need)	Plan Details	Status	Care Plan Actions
Patient's Weight	We need to get patient's weight in a certain range.	Plan Interventions Details	In Progress	Edit Plan Delete Plan

[Add Intervention](#)

Users can click on Plan Intervention Details hyperlink, under the Plan Details column, to add Interventions.

Patient's Weight - We need to get patient's weight in a certain range.

+ Add Intervention Close

Clicking on Add Intervention will populate the Intervention pop-up.

Edit Intervention

Intervention Name: + Add Intervention

Intervention: + Add Intervention

Frequency: + Add Intervention

Responsible Party: + Add Intervention

Timeframe: + Add Intervention

Notes: + Add Intervention

Save Cancel

Users can only add up to a maximum of 3 'In Progress' Care Plans at a time. If User tries to add a 4th In Progress Care Plan Goal, the following error message will appear.

Error Message: There are 3 In Progress Care Plan Goals. Please mark at least 1 Care Plan Goal as 'Complete' to add more Goals.

Care Plan

A care plan is required for clients receiving services through Ryan White Part-B funded Medical and Non-Medical Case Management. A care plan should be updated with outcomes of interventions and revised or amended in response to changes in the client's life circumstances or goals. Tasks, referrals, and services should be updated as they are identified or completed, and not at set intervals. Regular case notes or progress notes should describe the progress toward meeting care plan goals by utilizing the "Case Notes" screen in Take Charge Texas or other approved electronic health records. Case managers should focus on no more than three goals at a time in order to not overwhelm clients with tasks.

Care plans must be updated at minimum every 6 months, with documentation that all required elements (problem statement/need, goals, interventions, responsible party, and timeframe) have been reviewed and, if appropriate, revised.

Users have the ability to change the status of Goals with status of 'Complete' or 'No Longer Applicable' to 'In Progress', hence having more than 3 'In Progress' goals at a time. However, User **will not** be able to add a new Care Plan Goal if there are 3 'In Progress' Goals at one time.

TCT CARE Worker Users will be able to enter a treatment plan in the CARE Plans screen of Case tab in a client's profile, in accordance to the federal and state monitoring requirements for DSHS.

Feature Updates: Sprint 6

Update Letter Triggering Conditions

The Renewal Approval Letter will now include all THMP approved clients (ADAP, SPAP, or TIAP) who are not On Hold and have 'Mail' selected as their contact preference.

If multiple actions are occurring on a client's profile in one single day, the following hierarchy will be used to ensure only one letter prints for a client within a single day:

1. Client/Pharmacy Update Letter (previously named Client Update Letter)
2. New Client Letter (previously named Client Assignment Letter Client)
3. Renewal Approval Letter (previously named Client Approval (Acceptance) Letter)

If multiple actions are occurring on a client's profile in one single day which would trigger multiple Client/Pharmacy Update Letters, then only the latest Client/Pharmacy Update Letter will be generated for that client.

TCT Portal will have updated triggering conditions for Client Letters, so multiple letters don't print for a client within a single day.

Update Client Letter Templates

The following letter templates have been updated in TCT:

- Client/Pharmacy Update Letter (Previously named Client Update Letter)
- New Client Letter (Previously named Client Assignment Letter Client)
- New Client Letter Pharmacy Copy (Previously named Client Assignment Letter Pharmacy)
- Renewal Approval Letter (Previously named Client Approval (Acceptance) Letter)

Search and View Letters

Search: Type: Category:

Letters

Title	Type	Category
Client Request for Identification Letter	Scheduled	AD
Client Request for Self-Administration Letter	Scheduled	AD
Client/Pharmacy Update Letter	Scheduled	AD
Client/Pharmacy Update Letter Pharmacy Copy	Scheduled	AD
Client/Pharmacy Update Letter Pharmacy Copy (Secondary Site)	Scheduled	AD
New Client Letter	Scheduled	AD
New Client Letter Pharmacy Copy	Scheduled	AD
New Client Letter Pharmacy Copy (Secondary Site)	Scheduled	AD
Renewal Approval Letter	Scheduled	AD

Showing items 1 to 9 of 9

TCT users will be able to view updated templates for Client Update Letter, Client Assignment Letter Client, Client Assignment Letter Pharmacy, and Client Approval (Acceptance) Letter.

Feature Updates: Sprint 6

Client/Pharmacy Update Letter Pharmacy Copy

The Client/Pharmacy Update Letter Pharmacy Copy is a newly created scheduled letter which can be selected and utilized to search by either Date and/or Client ID. Users will also have the ability to export in a PDF format.



July 13, 2023

Anderson Clinic Pharmacy
5184 Tex Oak Ave., Ste 03, 711
Attn: Mayur Patel, R.Ph.
Dallas, TX 75235

The Client/Pharmacy Update Letter Pharmacy Copy will have a DSHS Letterhead and a cover letter.

The cover letter of the Client/Pharmacy Update Letter Pharmacy Copy will display the address of the Pharmacy. The cover letter of the Client/Pharmacy Update Letter will display the address of the client.

The Letter will also contain instructions for ordering medications through THMP in both English and Spanish.

The Client/Pharmacy Update Letter Pharmacy Copy will only be generated for Active, ADAP Approved clients that are not On Hold in the following scenarios:

- When a client's drug regimen is updated (medication is added, or medication is dropped)
- When a client's assigned pharmacy is updated
 - Primary participating pharmacy is changed to a different primary participating pharmacy
 - Secondary site is changed to a different secondary site

If multiple actions are occurring on a client's profile in one single day which would trigger multiple Client/Pharmacy Update Pharmacy Copy Letters, then only the latest Client/Pharmacy Update Pharmacy Copy Letter will be generated for that client.

TCT Pharmacists will have the ability to receive an update letter when a change has been made to a client's assigned pharmacy or drug regimen so that they are aware of the updates.

Feature Updates: Sprint 6

Monthly Pharmacy Orders Report

Once on the Reports tile, filter out the Type by Scheduled to view the option of selecting Monthly Pharmacy Orders Report. HRAR Admins will have the ability to update the roles that have access to the Monthly Pharmacy Orders Report through the Role to Screen Mapping feature.

Generated Date	Report	Format	Action
07/10/2023	Monthly Pharmacy Orders Report	PDF	Download
07/10/2023	Monthly Pharmacy Orders Report	PDF	Download
07/10/2023	Monthly Pharmacy Orders Report	PDF	Download
07/10/2023	Monthly Pharmacy Orders Report	PDF	Download
07/10/2023	Monthly Pharmacy Orders Report	PDF	Download
07/10/2023	Monthly Pharmacy Orders Report	PDF	Download
07/10/2023	Monthly Pharmacy Orders Report	PDF	Download
07/10/2023	Monthly Pharmacy Orders Report	PDF	Download

The report will be generated on a monthly basis, and will be available on the first of each month with data from the previous month. Users can search by the Pharmacy ID.

Users will have the ability to export the results in the following formats: Excel, PDF or Word.

The report will request Users to enter in the Start Date and End Date to provide results.

For orders which have been transferred with a date that is after the first of the month (i.e., after this report is generated), the System will not update the previously generated report to reflect the order transfer.

DSHS HRAR Admin, ADAP DataManAdmin, and ADAP Order Processor can now view a report generated to monitor monthly pharmacy orders so that they can analyze the number of orders and total units ordered by pharmacies.

Client Order Count by Medication Report

Once on the Reports tile, filter out the Type by On Demand to view the option of selecting Client Order Count by Medication Report. HRAR Admins will have the ability to update the roles that have access to the Client Order Count by Medication Report through the Role to Screen Mapping feature.

Generated Date	Report	Format	Action
07/10/2023	Client Order Count by Medication Report	PDF	Download
07/10/2023	Client Order Count by Medication Report	PDF	Download
07/10/2023	Client Order Count by Medication Report	PDF	Download
07/10/2023	Client Order Count by Medication Report	PDF	Download
07/10/2023	Client Order Count by Medication Report	PDF	Download
07/10/2023	Client Order Count by Medication Report	PDF	Download
07/10/2023	Client Order Count by Medication Report	PDF	Download
07/10/2023	Client Order Count by Medication Report	PDF	Download

The report will request Users to enter in the Start Date, End Date and ask the format in which the User would like the results to be exported in.

The report will entail data associated with submitted orders.

Users will have the ability to export the results in the following formats: Excel, PDF.

DSHS HRAR Admin, ADAP DataManAdmin, and ADAP Order Processor can now view a report generated to monitor how many times a medication was ordered and how many clients it was ordered for.