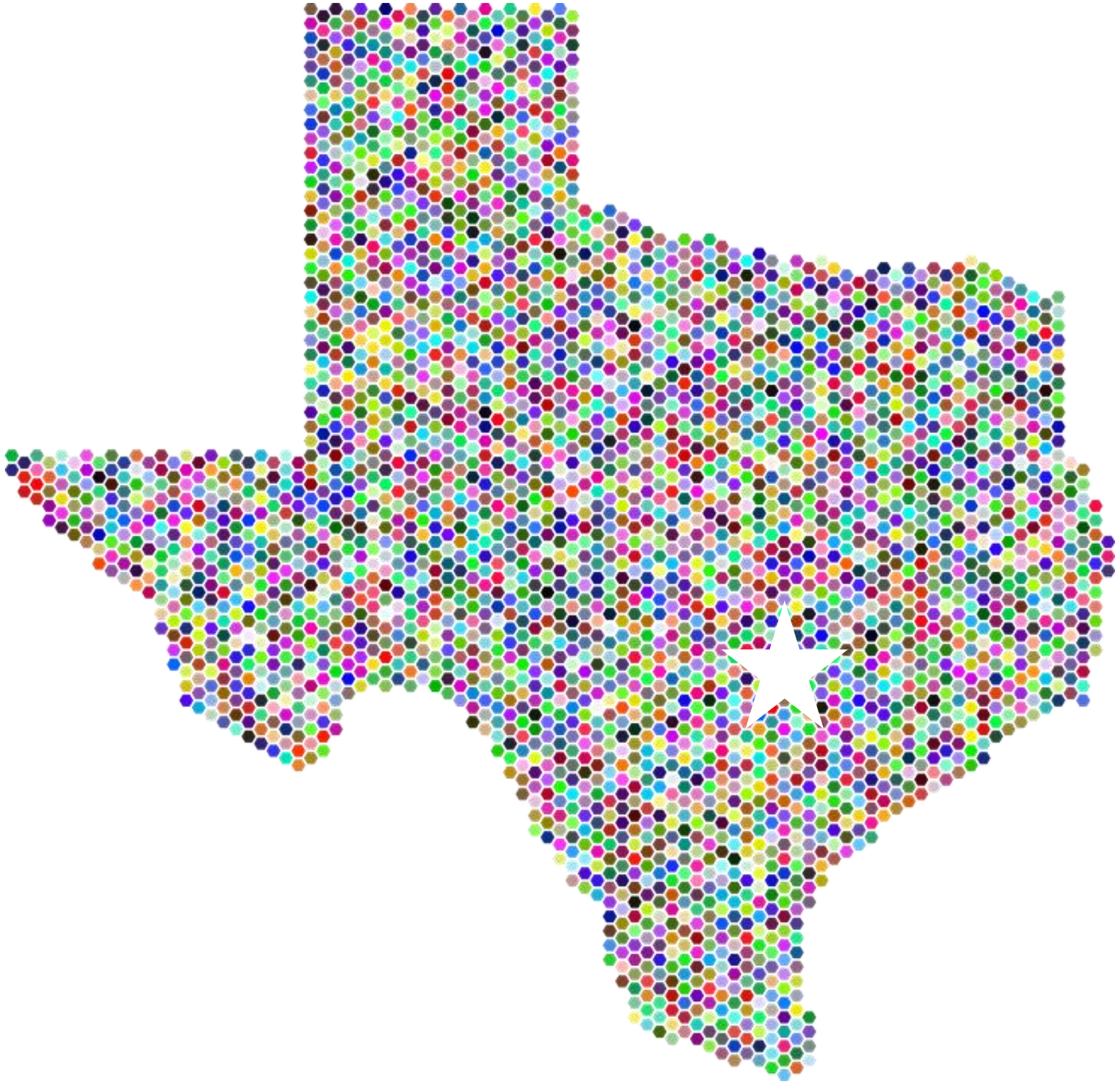
Take Charge Texas (TCT) User Engagement Session

March 28th, 2024



Meet the Facilitators

DSHS/HHSC TEAM

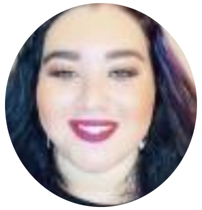
Charletha Joseph
Program Support

Rachel Sanor
HIV Care and Medications Unit Director

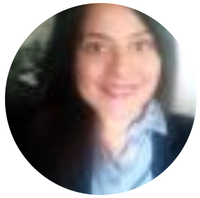
Christine Salinas
ADAP Regional Manager

Janina Vazquez
HIV Care Services Group Manager

Holly Benavides
TCT Help Desk Program Specialist



Ethel Garcia
Medication Data and Analysis Group Manager



Sylvia Jimenez
THMP Group Manager

DELOITTE TEAM

Nikki Fernandes
Project Manager

Meeta Sharma
Test Lead

Hunter Chernyha
Team Lead/Scrum Master

Krishna Dixit
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Caleb Fingel
Analyst/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?

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: Successfully Completed Features

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

Sprint 9

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

Sprint 10

Focused on enhancing the financial information, FPL process and history tracking capabilities for financials and insurance. Additionally, updated the SFTP process for Medical and Services imports to allow for increased data import volume.

Sprint 11

Focused on enhancing the Financial Information and its history, updating the FPL process to accommodate TCT and non-TCT Portal Clients for RSR Reporting, in addition, curated pharmacy report for overrides. Furthermore, established SFTP process for Medical and Services Import through Global Scape.

Sprint 12

Focused on enhancing the medication resubmission process as well as updating the verbiage within the HOPWA contracts. Furthermore, provided the capability for Admins to view the FPL and RSR Client by Zip Code Reports, and enhancements to allow System denial on expired Eligibility periods.

User Stories

Sprint 9
- Masking SSN on Client Search and Client Details Screens
- Display Created By on Order Dashboard
- Notification for Order Override Denials for Pharmacist
- Notification for Order Override Approvals for Pharmacist
- 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
- HAB Report – Multiple Agency Selection
- Generating Pharmacy Copy Letters Based on Latest Transaction
- Updated Services Import XML Process to Include AIDN
- Updated Medical Import XML Process to Include AIDN

Sprint 10
- Client Financial Information Enhancements
- Creating History Log: Financial Data
- Relationships Screen Enhancements
- Creating History Log: Insurance History
- Pharmacy Portal: Indication Whether Batches were Received
- Resubmission Process for Resubmission of Orders
- RSR: Calculating Missing FPL Values for CARE Clients via Batch
- FPL Process: Create Client Import Process Enhancement
- STFP Process: Service Records Updates
- STFP Process: Service Records – Successful Client Update Email
- STFP Process: Service Records – Failed Client Update Email
- STFP Process Medical Records Updates
- STFP Process: Medical Records – Successful Client Update Email
- STFP Process: Medical Records – Failed Client Update Email

Sprint 11
- Document Start and End Date Enhancements
- Standardize Login Error Messages in Agency Portal
- FPL: Overriding System Derived Household FPL for CARE Clients
- Enhancements to Comments Provided When Overriding or Ending Eligibility
- TCT Client Portal – Instructional Text Updates
- Order Override Accessibility Enhancement
- Shipment Resubmission Overrides
- Client Medicine Order History Enhancements
- Pharmacy Report: Client Regimen Overrides
- Pharmacy Report: Order Overrides
- Ad Hoc Query: Facility Information Enhancements
- Removing Pre-Selected Services on Recert and Self-Attest Applications

Sprint 12
- Banner Message Configuration for Portal Downtime
- Pharmacy Report: Medication Resubmitted
- Shipment Resubmission Overrides Denial Notification
- Shipment Resubmission Overrides Approval Notification
- Resubmission of Medications Enhancement
- Update Primary, Secondary, and Subservice Names for HOPWA Contracts
- RSR Client by Zip Code Report
- FPL: RSR CARE System-Derived FPL Report

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 13

Focused on enhancing the Task Board, search capabilities post Client merge, and application workflow in the Client Portal. Additionally, provided enhanced features for Staff Audit Report, while introducing the Worker Performance Report, WICY Report and Unsubmitted Client Application Report for seamless workflow process.

SPRINT 14

Focused on enhancing the eligibility process as well as updating the RSR Completeness Report and RSR Client by Zip Code Report. Furthermore, introduced beneficial features to the STAR Report, and automations to the Task Board.

User Stories

Sprint 13
- Client Services Detail Record Enhancements
- Task Board Assignment Enhancement
- Staff Audit Report: Search by Username
- Save & Exit Applications in Client Portal
- Unsubmitted Client Application Report
- Worker Performance Report: Applications Processed
- WICY Report
- Ability to Search with Prior Client IDs Post Client Merge

Sprint 14
- RSR Completeness Report: Update Client IDs to Hyperlinks
- Pending Eligibility Report: Including CARE Filter
- Automating Task Status on Task Board
- STAR Report - Multiple Agency Selection
- STAR Report: Contract & Funding Source Filter Enhancements
- STAR Report: Viral Load & CD4 Count Category Enhancement
- STAR Report: Primary Service Filter Enhancements
- STAR Report: Client Data Section
- RSR Client By Zip Code Report: Addition of Address Type

Project Plan: In Progress Features

The graphic below represents the features & user stories our team is currently consuming for Sprint 15.

Jan '24

We are here

Sprint 15

Jan '25

Focusing on enhancing Worker Performance Report and Clients Coming Up for Renewal Report, while advancing the Clients on Hold and HAB Reports. Furthermore, restructuring the THMP Referral to be displayed on the Eligibility Period Selection Screen and preventing Users from Ending Current Eligibility when applications are pending processing to ensure eligible Clients can avail services.

- Worker Performance Report: Applications Submitted & Eligibility Processed
- Clients Coming Up for Renewal Report Enhancements
- Display THMP Referral on the Eligibility Period Selection Screen
- Preventing Users from Ending Current Eligibility due to Applications Pending Processing
- Clients on Hold Report
- Client Name Enhancements
- Pharmacy Portal: Email Notifications to Admins When Placing Orders for Multiple Pharmacies
- Addition of Pharmacy Site Information on Client Drug Screen
- HAB Report: Addition of Ethnicity Field
- Separate THMP & CARE Eligibility Processing
- Eligibility Period Selection Page Enhancements: Displaying All Submitted Applications
- Adding 6 Months to Eligibility Periods

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

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

Worker Performance Report: Applications Processed

WICY Report

STAR Report

Unsubmitted Client Application Report

Pending Eligibility Report: Including CARE Filter

Task Board Assignment Enhancement & Automating Task Status on Task Board

Client Services Detail Record Enhancements

Gathering Your Feedback

Poll Everywhere

Poll Everywhere

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

How to Provide Feedback to TCT?

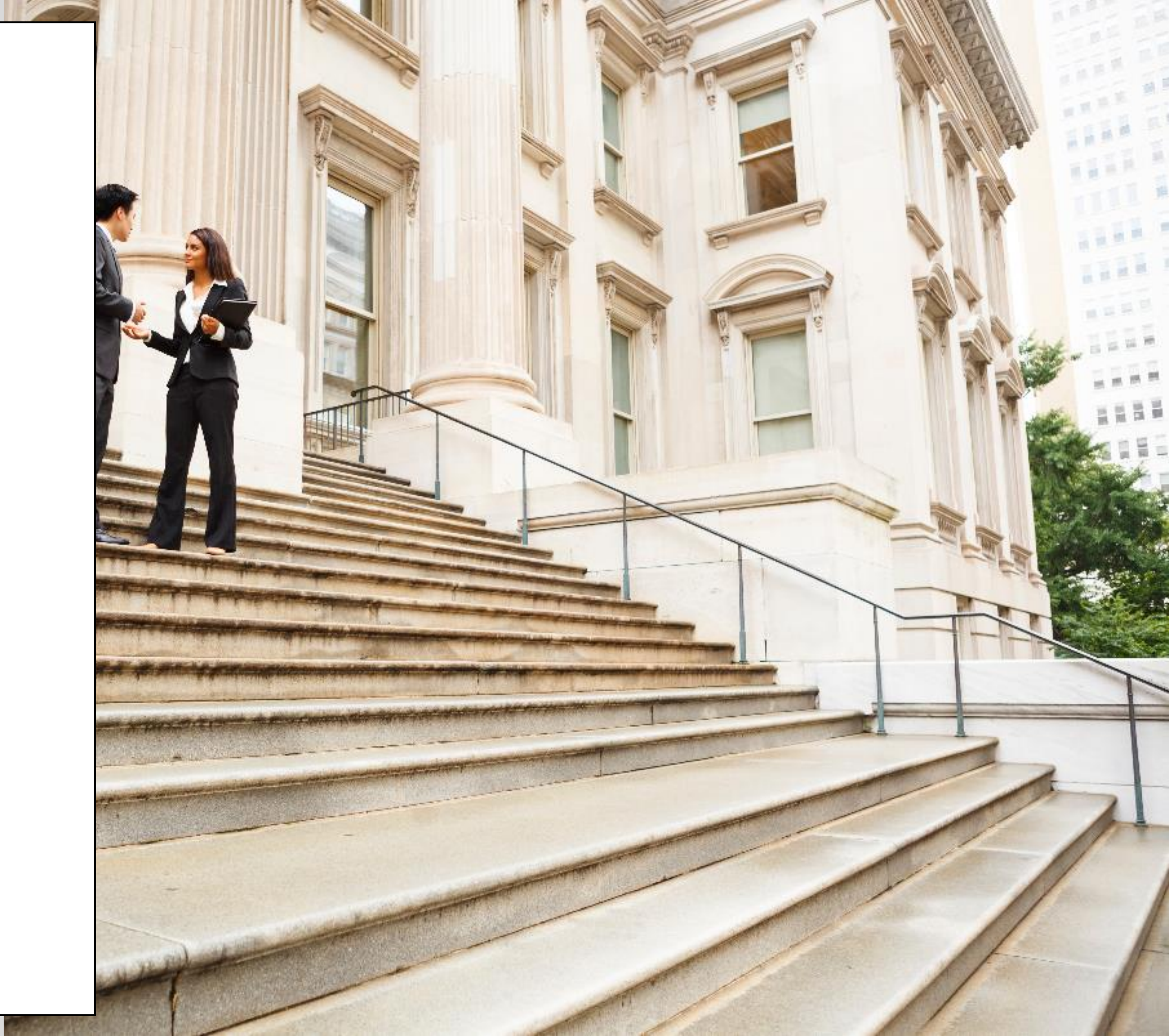
The **TakeChargeTexas Portal**, is a system with a goal to benefit all end users – providers, admins and clients. To achieve future growth and scale, **we request you to provide your suggestions and feedback.**

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.

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Thank You!

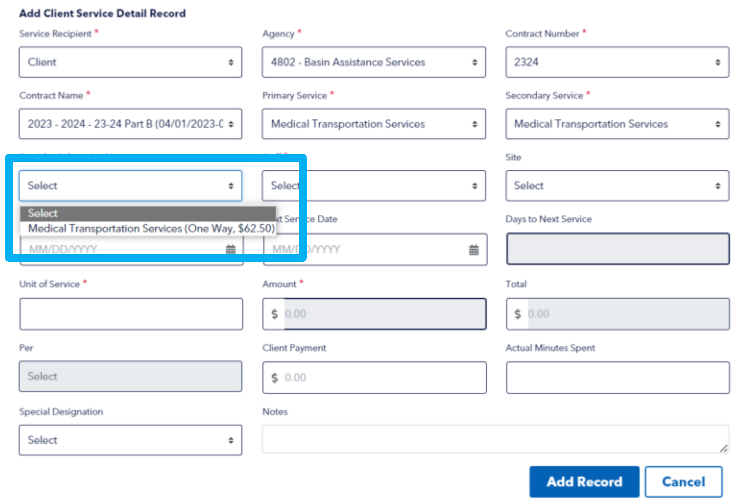
System Overview: New TCT Features

Feature Updates: Sprint 13

Client Services Detail Record Enhancements

The Provider Subservice Name field will concatenate to display the picklist values to the values indicated in the Contracts from the Default Price field, for Amount field for the applicable Provider Subservice Name.

The Provider Subservice Name field will concatenate to display the picklist values to the values indicated in the Contracts from Unit field on the Subservice field, for Per field for the applicable Provider Subservice Name.



- *If there are values in the Provider Subservice Name field, the User will select a provider subservice value in the dropdown (which provides the per and amount values), and the Amount and Per fields on the pop-up will auto-populated and will be non-editable.*
- *When the Provider Subservice Name field does not have values in the dropdown, then the Amount and Per fields will be editable.*
- *Home dashboard page of the Client of Client Portal (once logged in)*
- *The System will automatically combine the name of the Subservice, the Unit and Default Price saved in Contracts as an option in the Provider Subservice Name field in the Add Client Service Detail Record pop-up.*
- *On the Add Client Service Detail Record pop-up, the Provider Subservice Name will be optional field now.*
- *The Amount will remain a mandatory field and Per field will remain optional field.*
- *The Amount and Per fields will become editable if no option is available in the Provider Subservice Name field.*
- *If there is no value provided for the Per and/or Amount field for a Provider Subservice Name selected, then that field will be displayed as hyphen.*
- *When a User selects the Provider Subservice Name, the Per field will be automatically populated, as applicable.*
- *When a User selects the Provider Subservice Name, the Amount field will be automatically populated, as applicable.*

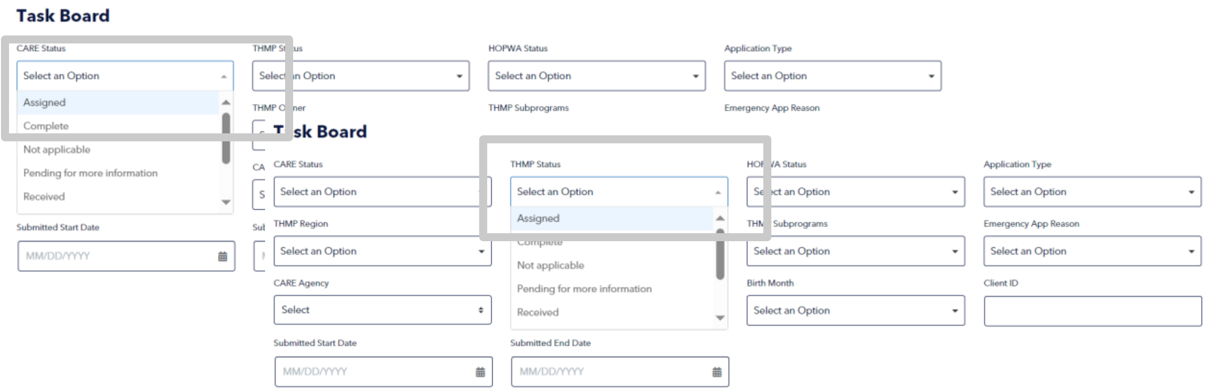
TCT Users will be able to view the Amount and Per fields as auto-populated based on the value indicated in the Contracts, so that reports can be pulled with efficient data.

Feature Updates: Sprint 13

Task Board Assignment Enhancement

When a User navigates to the Task Board screen, and clicks on the CARE Status or THMP Status, both dropdown fields, as well the Edit Task pop-up, it will be updated to include the below new status:

- *Assigned*



When a User clicks on the Edit under the Actions column, is navigated to the Edit Task pop-up, and selects a CARE Owner and/or THMP Owner, and saves the changes, the CARE Status and/or THMP Status will be updated from 'Submitted' status to 'Assigned' status automatically.

When a User selects multiple records under the Select column, performs bulk assignment on the records by selecting a CARE Owner and/or THMP Owner, and saves the changes, the CARE Status and/or THMP Status will be updated from 'Submitted' status to 'Assigned' status automatically.

The above logic will only be applicable in the below scenarios:

- *The task record(s) will be automatically assigned from 'Submitted' to 'Assigned' only on the initial assignment of a CARE Owner and/or THMP Owner.*
- *The task record(s) will be automatically assigned only from the status of 'Submitted' to the status of 'Assigned'.*

TCT users will be able to view the CARE Status and THMP Status columns on the Task Board be automatically updated to the 'Assigned' status if a TCT Staff has been assigned an Owner, so that workflow is efficient.

Feature Updates: Sprint 13

Staff Audit Report: Search by Username

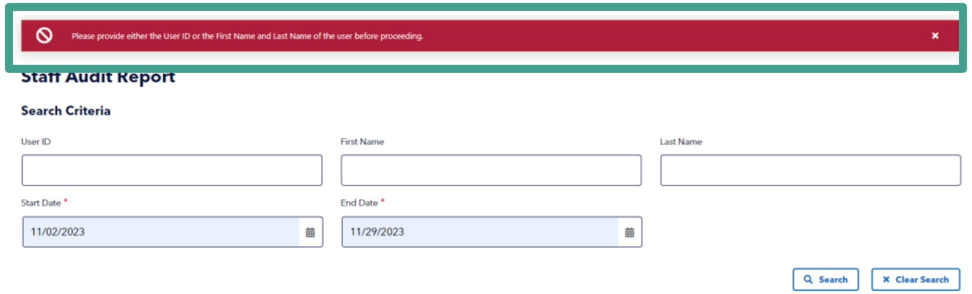
When a User navigates to the Staff Audit Report, in the Search Criteria,

The below search fields have been added:

- *First Name*
- *Last Name*
- *The field titled 'Login UserName' has been updated to 'User ID'*

If a user attempts to search with only the Start Date and End Date and does not provide either the User ID or the First Name and Last Name, the following validation will be displayed:

- *"Please provide either the User ID or the First Name and Last Name of the user before proceeding."*



When the User enters in the search criteria values, and clicks on Search, in the results table,
• The User Name column will display the values entered in the First Name and Last Name search criteria in the format of: Last Name, First Name

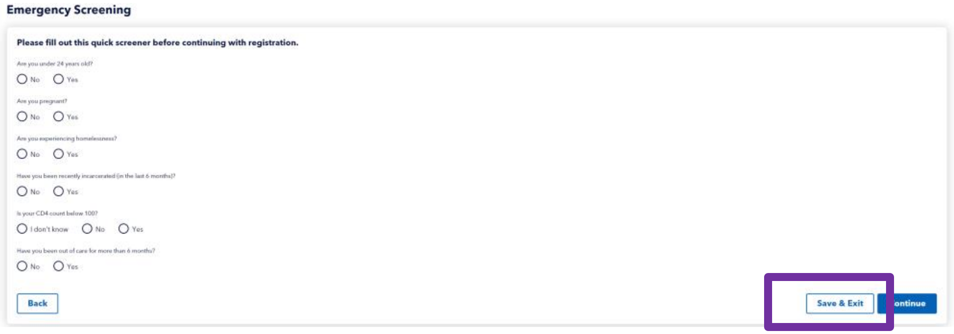
TCT Users will be able to search the Staff Audit Report by additional criteria to be able to utilize the report more effectively.

Feature Updates: Sprint 13

Save & Exit Applications in Client Portal

In the Client Portal, on all the below screens, the button titled 'Exit to Dashboard' will be updated to be titled 'Save & Exit':

- *Emergency Screening , My Needs, About Me, My Relationships, My Health, My Income, My Insurance, My Documents, Agency Selection, Review Application, Certify and Submit*

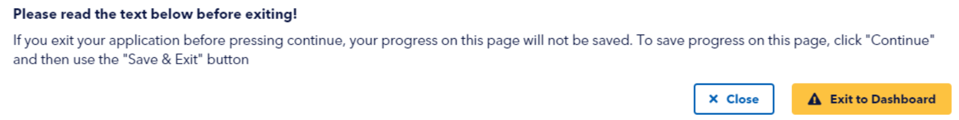


This update will impact the below application types:

- *New application, Referral, Self-Attestation, Re-certification, Change Request*

When a User clicks on 'Save & Exit' button, a pop-up will appear with the below information

- *The header will read:*
  - *Please read the text below before exiting!*
- *The message will read:*
  - *If you exit your application before pressing continue, your progress on this page will not be saved. To save progress on this page, click "Continue" and then use the "Save & Exit" button.*
- *Users will have the option of the two actions below:*
  - *Close*
  - *Exit to Dashboard*



TCT Users will be able to save and exit an application in the Client Portal and be able to come back and resume it from the portion they saved it.

Feature Updates: Sprint 13

Unsubmitted Client Application Report

The new ad hoc report tilted 'Unsubmitted Client Application Report' is in the Reports tile, beneath the Pending Eligibility Report.

The following user roles will have access to the Unsubmitted Client Application Report:

• ADAP EW PSIII, ADAP PSIV PSV, ADAP Data ManAdmin, HRAR Admin, Agency Client Services Staff, Agency Client Services Supervisor/Manager, AA Data Manager

HRAR Admins will have the ability to update the roles that have access to the Unsubmitted Client Application Report through the Role to Screen Mapping feature.

The following roles will have access to view all unsubmitted applications as part of the report:

• ADAP EW PSIII, ADAP PSIV PSV, ADAP Data ManAdmin, HRAR Admin

The following roles will only have access to view unsubmitted applications for their agency:

• Agency Client Services Staff, Agency Client Services Supervisor/Manager

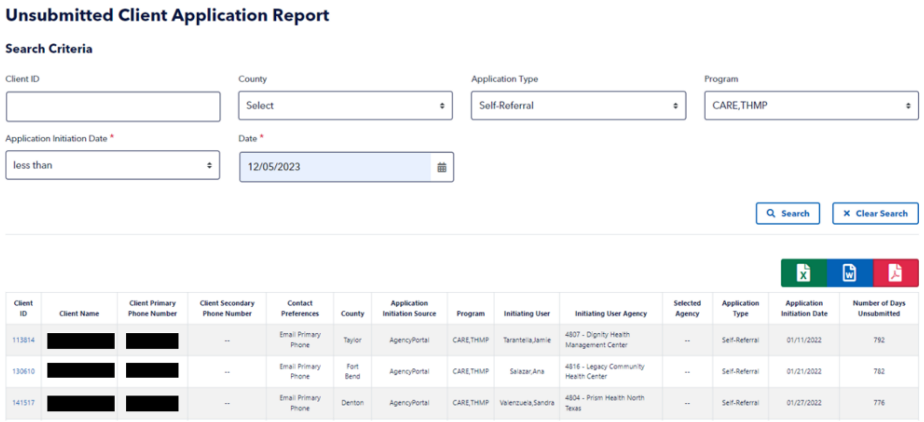
The following role will have access to view unsubmitted applications for all agencies within their administrative agency local area (i.e. either the Initiating User Agency or Selected Agency must be an agency that falls within their administrative agency local area):

• AA Data Manager

The report will generate data on applications that have been initiated but not submitted.

The Unsubmitted Applications Report will contain the following filters:

• Client ID, County, Application Type (Application, Recertification, Self-Attestation, Referral, Change Request), Program (CARE, THMP, CARE, THMP, Not Designated), Application Initiation Date (Between, Equal to, Greater than, Less than)



Unsubmitted Client Application Report

Search Criteria

Client ID:
County: Select
Application Type: Self-Referral
Program: CARE,THMP
Application Initiation Date *: less than
Date *: 12/05/2023

Search | Clear Search

Client ID	Client Name	Client Primary Phone Number	Client Secondary Phone Number	Contact Preferences	County	Application Initiation Source	Program	Initiating User	Initiating User Agency	Selected Agency	Application Type	Application Initiation Date	Number of Days Unsubmitted
113814	[redacted]	[redacted]	--	Email Primary Phone	Taylor	AgencyPortal	CARE,THMP	Tarantella,Jamie	4807 - Dignity Health Management Center	--	Self-Referral	01/11/2022	792
130610	[redacted]	[redacted]	--	Email Primary Phone	Fort Bend	AgencyPortal	CARE,THMP	Salazar,Ana	4816 - Legacy Community Health Center	--	Self-Referral	01/21/2022	782
141517	[redacted]	[redacted]	--	Email Primary Phone	Denton	AgencyPortal	CARE,THMP	Valenzuela,Sandra	4804 - Prism Health North Texas	--	Self-Referral	01/27/2022	776

TCT Users will have an ad hoc report generated to monitor applications that have been initiated but not submitted so that they can take the appropriate action to ensure the applications are submitted.

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Feature Updates: Sprint 13

Worker Performance Report: Applications Processed

There is a new report tilted 'Worker Performance Report: Applications Processed' in the Reports tile, under Eligibility Report .

The following user roles will have access to the 'Worker Performance Report':

- *HRAR_Admin, DSHS_Program_Staff, Agency Client Services Supervisor Manager, Data Managers, AA_Program_Staff*

HRAR Admins will have the ability to update the roles that have access to the Worker Performance Report: Applications Processed through the Role to Screen Mapping feature.

Users will be able to search using the below search fields on the Worker Performance Report screen:

- *Agency, Worker Name, Eligibility Decision Date (Between, Equal to, Greater than, Less than), Format (PDF, Excel), Program (THMP, CARE)*

All eligibility transactions will appear on the Worker Performance Report.

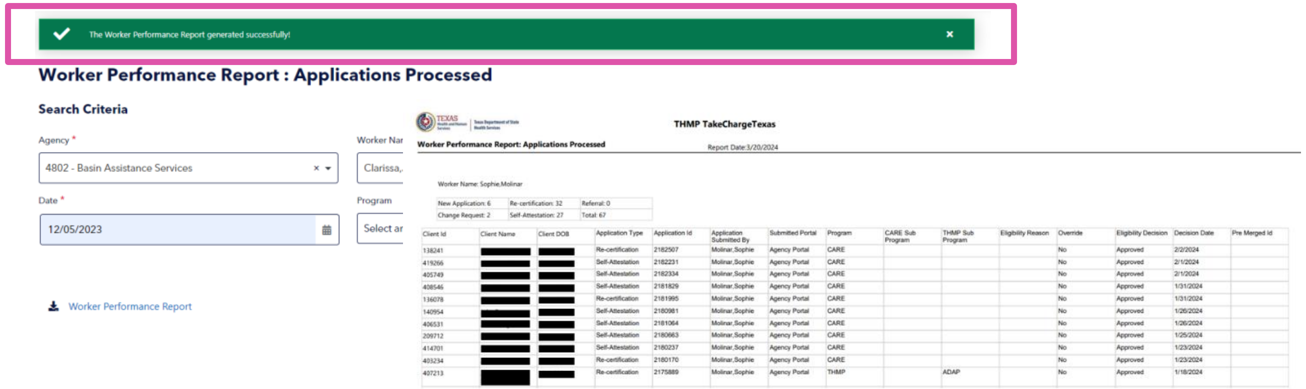
The Pre-Merged Record column will display the old, dissolved client ID. Only the applications submitted and processed before the merge, will display the old client ID. All other applications after that will not display the pre-merged Client ID.

Above the results table, the below fields will be displayed:
- *Worker Name, New Application, Referral, Self-Attestation, Re-certification, Change Request, Total*

The order of the records in the results table will be in descending order.

This report will shows application which have been submitted, eligibility has been processed and a Eligibility Decision has been made.

When a User clicks on Generate, the System will generate a downloadable link with the results of the search.



TCT Admin will be able to view a report providing the performance of workers processing the eligibility processed for their applications, hence being able to ensure applications are being managed effectively.

Feature Updates: Sprint 13

WICY Report

A new ad-hoc report tilted 'WICY Report' will be created in the Reports tile, under the View STAR Reports link.

The following user roles will have access to the WICY Report:

• AA Data Manager, HRAR Admin

HRAR Admins will have the ability to update the roles that have access to the WICY Report through the Role to Screen Mapping feature.

All clients included in the WICY Report must meet all of the conditions below:

• Have a client service record with a Date of Service that falls on or within the Service Start Date and Service End Date provided

• The client's service record must be associated with a contract that has one of the below funding sources:

- *Ryan White Part A, Ryan White Part A Supplemental, Ryan White Part B, Ryan White Part B Supplemental, Ryan White Part C, Ryan White Part D*

In addition to the conditions above, clients must meet one of the conditions below to be grouped into one of the WICY Report sections. If a client does not meet one of the conditions below, their client service data will not be displayed on the WICY Report:

• Clients included in the Children (2-12) section of the report must meet all of the conditions below:

- *Be at least 2 years old and under 13 years old on the date provided in the Service End Date filter*

• Clients included in the Youth (13-24) section of the report must meet all of the conditions below:

- *Be at least 13 years old and under 25 years old on the date provided in the Service End Date filter*

• Clients included in the Women (25+) section of the report must meet all of the conditions below:

- *Be at least 25 years old on the date provided in the Service End Date filter*
- *Have a Sex at Birth value of 'Female'*

The WICY Report will contain the following filters:

• Service Start Date , Service End Date, Funding Source (Ryan White Part A, Ryan White Part A Supplemental, Ryan White Part B, Ryan White Part B Supplemental, Ryan White Part C, Ryan White Part D), Format (PDF,Excel)

Once the user selects the desired WICY Report format in the 'Format' filter, and generates the report, the report will become available for download on the WICY Report page in the selected format.

TCT Users will be able to access to a report that identifies all primary services women, infants, children, and youth clients have received within a selected timeframe, so that they can satisfy HRSA reporting requirements.

Feature Updates: Sprint 13

WICY Report Continued

At the top of the WICY Report, the following data will be available and display prior to the data table:

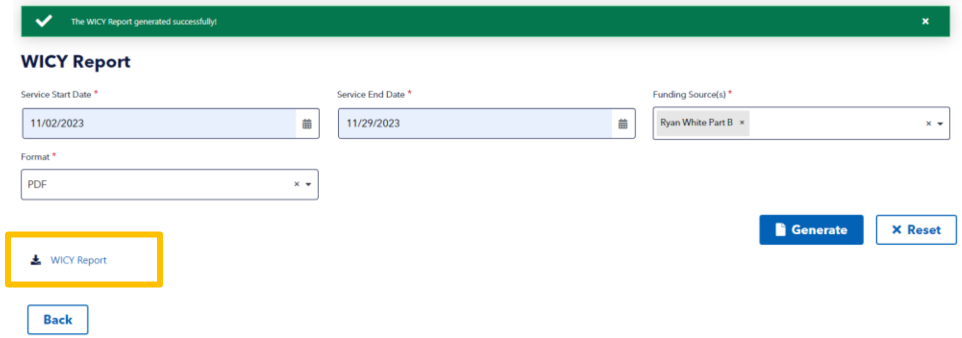
- *Service Start Date, Service End Date, Funding Source, Total WICY Expenditure*

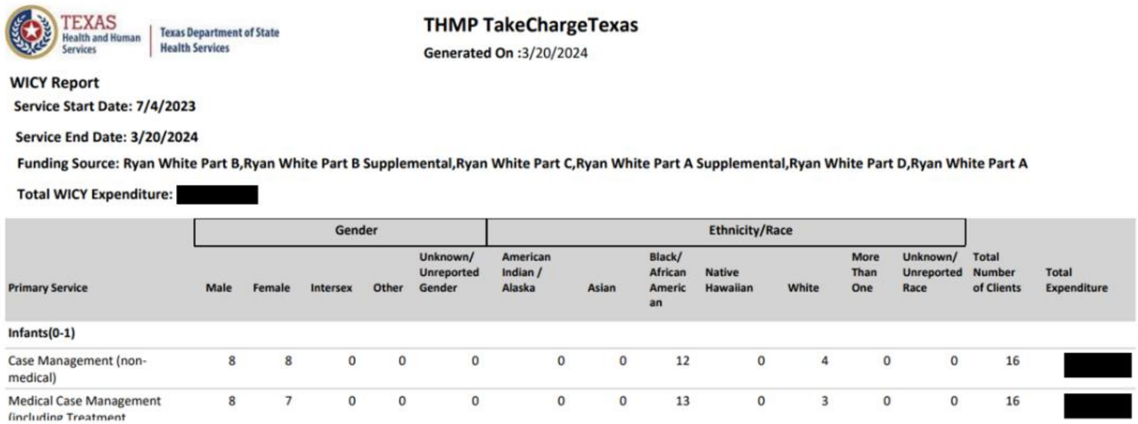
The WICY Report will be broken down into the following sections:

- *Infants (0-1), Children (2-12), Youth (13-24), Women (25+)*

The columns that display as part of the report output will be the same across all sections.

At the bottom of the data grid for each section of the WICY Report, a 'Total' row will display and will calculate the sum of the values in each column above, excluding the Primary Service column.





TEXAS Health and Human Services | Texas Department of State Health Services

THMP TakeChargeTexas

Generated On :3/20/2024

WICY Report

Service Start Date: 7/4/2023

Service End Date: 3/20/2024

Funding Source: Ryan White Part B,Ryan White Part B Supplemental,Ryan White Part C,Ryan White Part A Supplemental,Ryan White Part D,Ryan White Part A

Total WICY Expenditure: [redacted]

	Gender					Ethnicity/Race								
Primary Service	Male	Female	Intersex	Other	Unknown/ Unreported Gender	American Indian / Alaska	Asian	Black/ African American	Native Hawaiian	White	More Than One	Unknown/ Unreported Race	Total Number of Clients	Total Expenditure
Infants(0-1)														
Case Management (non-medical)	8	8	0	0	0	0	0	12	0	4	0	0	16	[redacted]
Medical Case Management (including Treatment	8	7	0	0	0	0	0	13	0	3	0	0	16	[redacted]

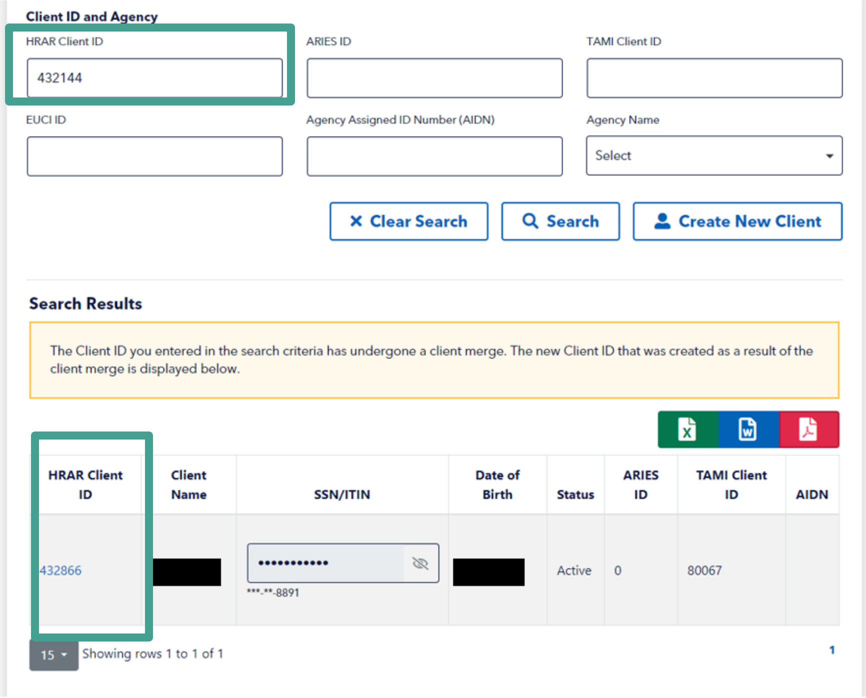
TCT Users will be able to access to a report that identifies all primary services women, infants, children, and youth clients have received within a selected timeframe, so that they can satisfy HRSA reporting requirements.

Feature Updates: Sprint 13

Ability to Search with Prior Client IDs Post Client Merge

When a user performs a Client Search and enters in a Client ID that has undergone a merge in the 'HRAR Client ID' search field, the following will occur:

- *System will display this client in the search results with the new Client ID that was created as a result of the merge in the 'HRAR Client ID' column*
- *A message will be displayed beneath the Search Results subheader that states the following:*
    - *"The Client ID you entered in the search criteria has undergone a client merge. The new Client ID that was created as a result of the client merge is displayed below."*



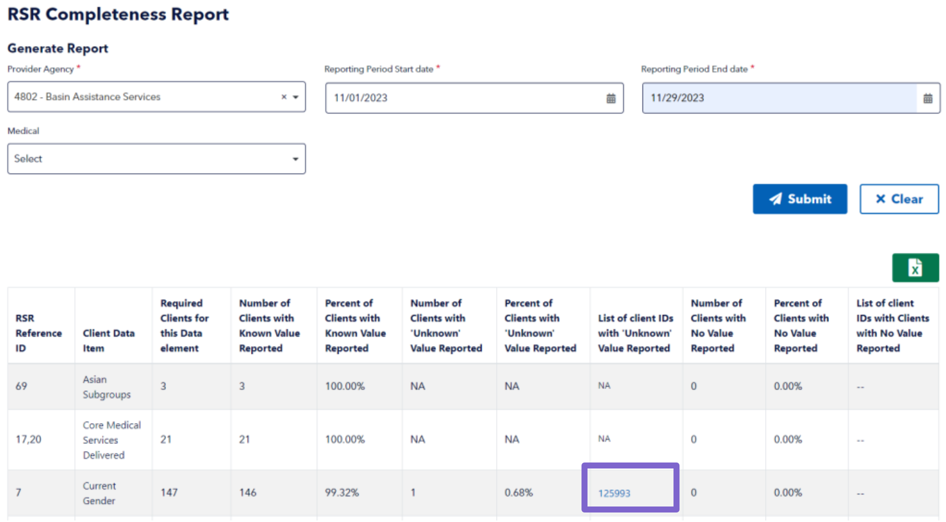
TCT Users will be able to perform a client search with an old Client ID that may no longer be present in TCT due to a client merge, so that they are able to easily find clients that have undergone a client merge in TCT.

Feature Updates: Sprint 14

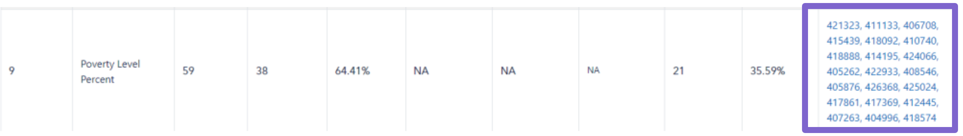
RSR Completeness Report: Update Client IDs to Hyperlinks

On the RSR Completeness Report, in the Reports tile, upon initiating a report,

- *The column 'List of client IDs with Clients with No Value Reported' and 'List of client IDs with 'Unknown' value reported' have the Client IDs as hyperlinks.*
- *The hyperlinked client IDs navigate the User to the client dashboard of that particular client.*



For records with multiple client IDs within the 'List of client IDs with Clients with No Value Reported' or 'List of client IDs with 'Unknown' value reported' columns, each client ID has an individual hyperlink, separated by a comma.



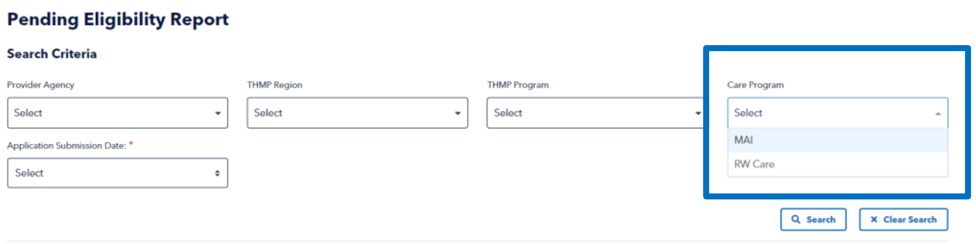
TCT Users will be able to access hyperlinks within the RSR Completeness report for the Client IDs, so that they can be navigated to the client dashboard and view information.

Feature Updates: Sprint 14

Pending Eligibility Report: Including CARE Filter

On the Pending Eligibility Report, the below new search field will be displayed:

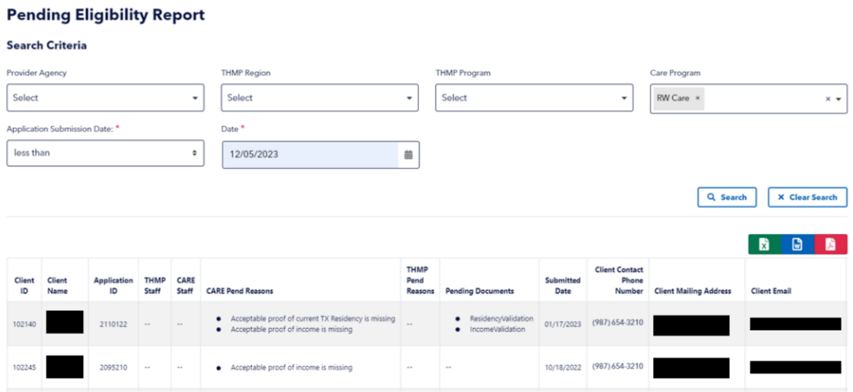
- *CARE Program*
    - *RW CARE*
    - *MAI*



In the Results table, there will be an additional column,

- *Application ID*
    - *This column will be populated with the application ID of that particular app.*
    - *When there is a dual program application, each program will be its own record. When there are two rows with the same application ID, it will indicate that it is a dual program application.*

For the current search field, THMP Program, it will be become a multi-select field, and will remain an optional search field.



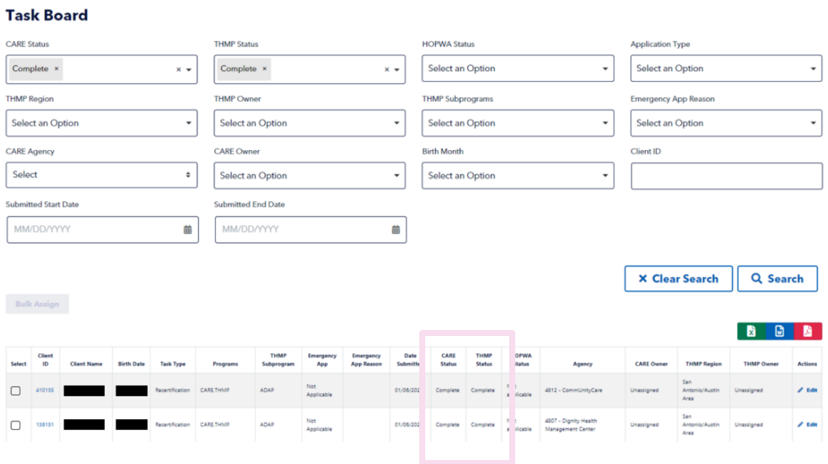
TCT users will be able to view a CARE Program as a search field on the Pending Eligibility Report, to be able to filter and view results.

Feature Updates: Sprint 14

Automating Task Status on Task Board

When a task is registered on the Task Board and a User processes the Eligibility for the Client, the THMP Status or CARE Status on the Task Board will automatically be updated to 'Complete'.

When a dual program task is registered on the Task Board with a CARE Status or THMP Status and a User processes the Eligibility for the Client, the CARE Status and/or THMP Status on the Task Board will automatically be updated to 'Complete'. This will be applicable to only the program for which the eligibility was run for.



This feature will be applicable to the below Status

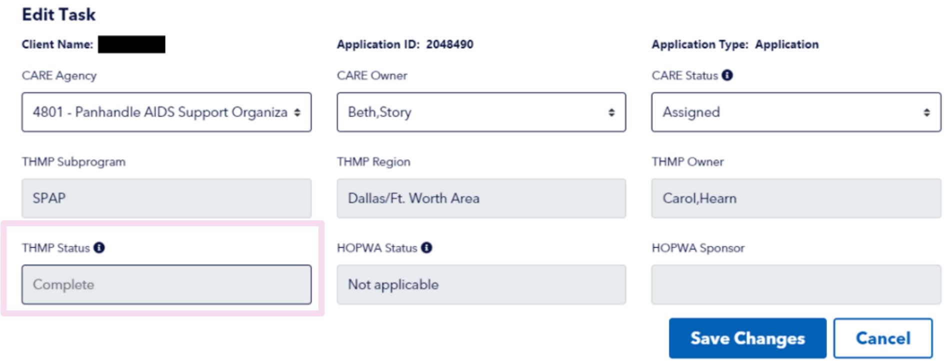
- *Submitted, Assigned, Received, Not Applicable, Pending More Information, Secondary Review, Under Review*

This feature will be applicable to the below application types

- *New Application, Change Request, Recertification, Self-Attestation, Self-Referral*

User will not be able to flip the status of a record on the Task Board from Complete to any other status, for CARE Status and THMP Status.

Once a task record is marked as Complete for the TMPH Status or CARE Status for singular program applications, the Edit pop-up will be greyed out.



TCT Users will be able to view the THMP Status and CARE Status of a task on the Task Board, automatically updated to Complete, if the eligibility has been processed for tasks regardless of the task status.

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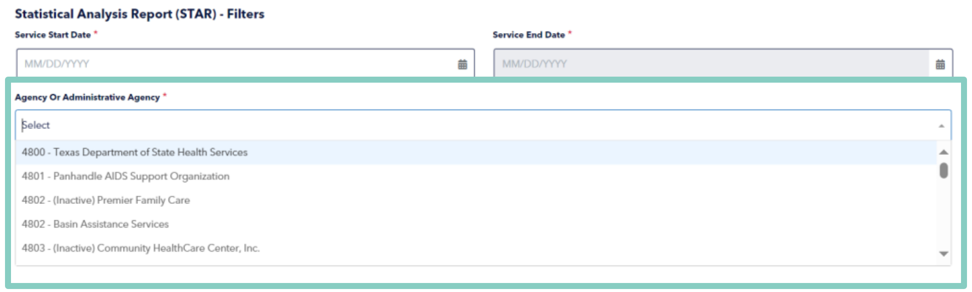
Feature Updates: Sprint 14

STAR Report - Multiple Agency Selection

On the STAR Report, in the Reports tile, in the 'Agency or Administrative Agency' field,

•This field will be a multi-select dropdown and User will be able to select multiple agencies for search.



'When a User selects '4800 - Department of State Health Services', they will not be able to select any other agency as '4800 - Department of State Health Services' is a parent agency.

• When this value is selected, all other agencies in the dropdown will be greyed out and not selectable to prevent any duplicate records.

When deselecting an option from the 'Agency or Administrative Agency' field, the applicable 'funding source' and 'contract' associated with the selection will be removed.

When viewing the report, the selected 'Agency or Administrative Agency' will be listed at the top of the report, under the title.

• If there are multiple 'Agency or Administrative Agency' fields selected, they will be separated with a comma.

'Funding Source' and 'Contract' field options will be dependent on 'Agency or Administrative Agency' field selection.

• When users select an 'Agency or Administrative Agency' they will have a filtered set of options for 'Funding Source' and 'Contract' fields.

TCT Users will be able to select multiple agencies in the STAR Report, so that they can view data across various agencies and assess the parameters.

Feature Updates: Sprint 14

STAR Report: Contract & Funding Source Filter Enhancements

On the STAR Report the following selection criteria will be updated:

Funding Source

- *The Funding Source will have a help text, with the below language:*
    - *There may be Funding Sources with exact name within one Agency or amongst different Agencies. Funding Sources with the same exact name will appear as one option. The report output will provide data from all the exact name Funding Sources.*

- *This field will be dependent upon the selection made in the 'Agency or Administrative Agency' field.*
- *Funding Sources with the same name will be combined and will be displayed as one value.*

Contract

- *The Contract field will have a help text, with the below language:*
    - *There may be Contracts with exact name within one Agency / Funding Sources or amongst different Agencies / Funding Sources. Contracts with exact name will appear as one option. The report output will provide data from all the exact name Contracts.*

- *This field will be dependent upon the selection made in the 'Agency or Administrative Agency' field AND the 'Funding Source' field.*
- *Contracts with the same name will be combined as will be displayed as one value.*

TCT Users will be able to filter the Funding Source and Contract as it relates to the Agency, so that they can curate the STAR report effectively.

Feature Updates: Sprint 14

STAR Report: Viral Load Count Category Enhancement

On the View Star Reports screen, in the Medical History parameter, upon selecting 'Accessible View' or 'Download PDF', in the Most Recent Viral Load Count section of the STAR Report,

The following categories have been removed,

- *Viral Load 0 – 50, Viral Load 51 – 100, Viral Load 101 – 500, Viral Load 501 – 10000, Viral Load 10001 – 50000, Viral Load 50001 – 100000, Viral Load 100001 – 500000, Viral Load 500001Plus*

The following categories have been added,

- *Viral Load 0 – 199, Viral Load 200 & Above*

Updated the below to capitalize the first letter of each word,

- *'Viral Load, no test record' to 'Viral Load, No Test Record'*

Most Recent Viral Load Count	Number of Clients	% of Total
ViralLoad 0 - 199	0	0.00%
Viral Load 200 & Above	0	0.00%
Viral Load, No Test Record	0	0.00%

Client's most recent Viral Load Count within the reporting period.

On the View Star Reports screen, upon selecting Medical History parameter, in the Most Recent CD4 Count section of the STAR Report,

The following categories have been removed,

- *CD4 500 – 749, CD4 750Plus*

The following categories have been added,

- *CD4 500 & Above*

Updated the below to capitalize the first letter of each word,

- *'CD4, no test record' to 'CD4, No Test Record'*

Most Recent CD4 Count	Number of Clients	% of Total
CD4 0 - 49	0	0.00%
CD4 50 - 99	0	0.00%
CD4 100 - 199	0	0.00%
CD4 200 - 349	0	0.00%
CD4 350 - 499	0	0.00%
CD4 500 & Above	0	0.00%
CD4, No Test Record	0	0.00%

Client's most recent CD4 count within the reporting period.

TCT Users will be able to view modified Viral Load Count & CD4 categories in the STAR report table, so that they can see which clients have viral loads less than 200.

Feature Updates: Sprint 14

STAR Report: Primary Service Filter Enhancements

On the STAR Report, when a User selects an 'Agency or Administrative Agency', and selects a 'Contract', the 'Primary Service' filter will,

- *Displays all the Primary Services associated with the selected Contract(s).*

When deselecting an option from the 'Contract' field, the applicable 'Primary Service' associated with the Contract removed, is removed from the Primary Service field.

The options displayed in Primary Service dropdown, based on the selected Contract, will be dependent on the information saved within the Contracts in the TCT Portal.

When viewing the STAR Report the 'Service Summary: Primary/Secondary' column will be split into two new additional columns:

- *Primary Service*
- *Secondary Service*
- *All the below columns will reflect the values accordingly as it associates to the Primary / Secondary Service combination:*
    - *UDC column, % of Total column, UOS column, Cost column*

The logic which is applied to the Service Summary: Primary/Secondary section is as follows:

- *If a User selects Primary Service(s), those selected Primary Service values and the associated Secondary Services will be displayed on the table.*
- *If a User does not select a Primary Service, then all the Primary Services associated with the selected Contract(s) will be displayed on the table, with the associated Secondary Services.*

Primary Service Name	Service Summary: Primary/Secondary	UDC	% of Total	UOS	Cost
AIDS Pharmaceutical Assistance	AIDS Pharmaceutical Assistance	2	0.77%	16.00	[redacted]
Case Management (non-medical)	Case Management (non-medical)	50	19.31%	525.00	[redacted]
Emergency Financial Assistance	Medication	2	0.77%	2.00	[redacted]
Food Bank/Home-Delivered Meals	Food Pantry/Voucher w/o Nutritional Supplements	8	3.09%	10.00	[redacted]
Health Insurance Premium and Cost Sharing Assistance	Health Insurance Premium and Cost Sharing Assistance	39	15.06%	136.00	[redacted]
Medical Case Management (including Treatment Adherence)	Plan Re-Evaluation	3	1.16%	3.00	[redacted]
Medical Case Management (including Treatment Adherence)	Medical Case Management Recertification	42	16.22%	124.00	[redacted]
Medical Case Management (including Treatment Adherence)	Service Coordination and Medical Follow-Up	6	2.32%	6.00	[redacted]
Medical Case Management (including Treatment Adherence)	Intake-Medical Case Management	8	3.09%	42.00	[redacted]
Medical Case Management (including Treatment Adherence)	Intake-No Medical Case Management	2	0.77%	8.00	[redacted]
Medical Case Management (including Treatment Adherence)	Medical Case Management (including Treatment Adherence)	51	19.69%	87.00	[redacted]
Medical Transportation Services	Medical Transportation Services	16	6.18%	16.00	[redacted]
Oral Health Care	Oral Health Care	11	4.25%	13.00	[redacted]
Outpatient/Ambulatory Health Services	Viral Load Test	51	19.69%	51.00	[redacted]
Outpatient/Ambulatory Health Services	Infectious Diseases	62	23.94%	64.00	[redacted]
Outpatient/Ambulatory Health Services	Outpatient/Ambulatory Health Services	3	1.16%	3.00	[redacted]
Outpatient/Ambulatory Health Services	Laboratory Service	54	20.85%	497.00	[redacted]
Referral for Health Care/Supportive Services	Application	91	35.14%	156.00	[redacted]
Referral for Health Care/Supportive Services	Referral for Health Care/Supportive Services	39	15.06%	145.00	[redacted]

Number of clients served (UDC) and total number of units (UOS) grouped by Primary/Secondary service.

TCT Users will be able to see Primary Service options based off of the Contract(s) selected in order to provide more concise information in the STAR Report.

Feature Updates: Sprint 14

STAR Report: Client Data Section

On the View STAR Report screen, under the Service Summary: Primary/Secondary section, there is a new section.

This section will be in a tabular format with the below columns.

- *Client ID, Agency, Organization ID, Contract Number, Contract Name, Funding Source , Primary Service Name, Secondary Service Name, Sub Service Name, Date of Service, Unit of Service, Cost*

The Client Detail section will be in descending order with the latest Date of Service record showing on the top.

The following export capabilities will be provided: Excel, PDF, and Word.

A Client will be displayed in this section, based on the selection made on the parameters of STAR Report.

•For example, a User selects Hopewell Agency and Star Agency, Clients associated with these agencies will be shown in the Client Detail section.

ClientID	Agency	OrganizationID	ContractNumber	ContractName	FundingSource	PrimaryServiceName	SecondaryServiceName	SubServiceName	DateOfService	UnitofService	Cost
423062	4812 - CommUnityCare	1500000204	470021350	EHE FY 23 -24	Ending the Epidemic	Outpatient/Ambulatory Health Services	Outpatient/Ambulatory Health Services	EHE OAHS Medical Care	07/10/2023	1	[redacted]
420326	4812 - CommUnityCare	1500000204	470021350	EHE FY 23 -24	Ending the Epidemic	Outpatient/Ambulatory Health Services	Outpatient/Ambulatory Health Services	EHE OAHS Medical Care	04/05/2023	1	[redacted]
420326	4812 - CommUnityCare	1500000204	470021350	EHE FY 23 -24	Ending the Epidemic	Outpatient/Ambulatory Health Services	Outpatient/Ambulatory Health Services	EHE OAHS Medical Care	05/03/2023	1	[redacted]
420326	4812 - CommUnityCare	1500000204	470021350	EHE FY 23 -24	Ending the Epidemic	Outpatient/Ambulatory Health Services	Outpatient/Ambulatory Health Services	EHE OAHS Medical Care	08/02/2023	1	[redacted]
420326	4812 - CommUnityCare	1500000204	470021350	EHE FY 23 -24	Ending the Epidemic	Outpatient/Ambulatory Health Services	Viral Load Test	EHE OAHS Viral Load Test	04/05/2023	1	[redacted]
420326	4812 - CommUnityCare	1500000204	470021350	EHE FY 23 -24	Ending the Epidemic	Outpatient/Ambulatory Health Services	CD-4 T-Cell Count	EHE OAHS CD-4 T-Cell Count	04/05/2023	1	[redacted]
420326	4812 - CommUnityCare	1500000204	470021350	EHE FY 23 -24	Ending the Epidemic	Outpatient/Ambulatory Health Services	Viral Load Test	EHE OAHS Viral Load Test	05/24/2023	1	[redacted]
420326	4812 - CommUnityCare	1500000204	470021350	EHE FY 23 -24	Ending the Epidemic	Outpatient/Ambulatory Health Services	CD-4 T-Cell Count	EHE OAHS CD-4 T-Cell Count	05/24/2023	1	[redacted]
420326	4812 - CommUnityCare	1500000204	470021350	EHE FY 23 -24	Ending the Epidemic	Outpatient/Ambulatory Health Services	Viral Load Test	EHE OAHS Viral Load Test	08/02/2023	1	[redacted]
420326	4812 - CommUnityCare	1500000204	470021350	EHE FY 23 -24	Ending the Epidemic	Outpatient/Ambulatory Health Services	CD-4 T-Cell Count	EHE OAHS CD-4 T-Cell Count	08/02/2023	1	[redacted]

TCT Users will be able to view all the Clients and their relevant information when they curate a STAR Report, so that they can analyze the output of the report.

Feature Updates: Sprint 14

RSR Client By Zip Code Report: Addition of Address Type

On the RSR Client By Zip Code Report, in the Client ID column,

•If the Client has a current physical address, a '(P)' will be marked after the client ID

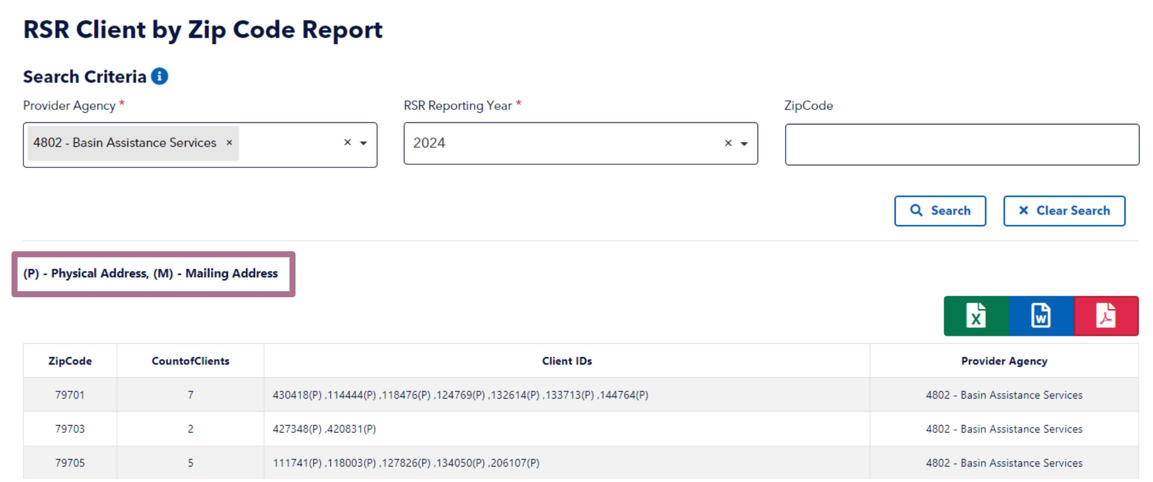
• If the Client does not have a current physical address, a '(M)' will be marked after the client ID

In the lower right-hand side of the screen, a help text will be displayed reading,

• "(P) – Physical Address, (M) – Mailing Address"

The columns of the results table will be in the following order:

- *ZipCode*
- *CountofClients*
- *Clients IDs*
- *Provider Agency*



TCT Users will be able to view the type of address in the RSR Client By Zip Code Report, so that they can decipher the report efficiently.

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