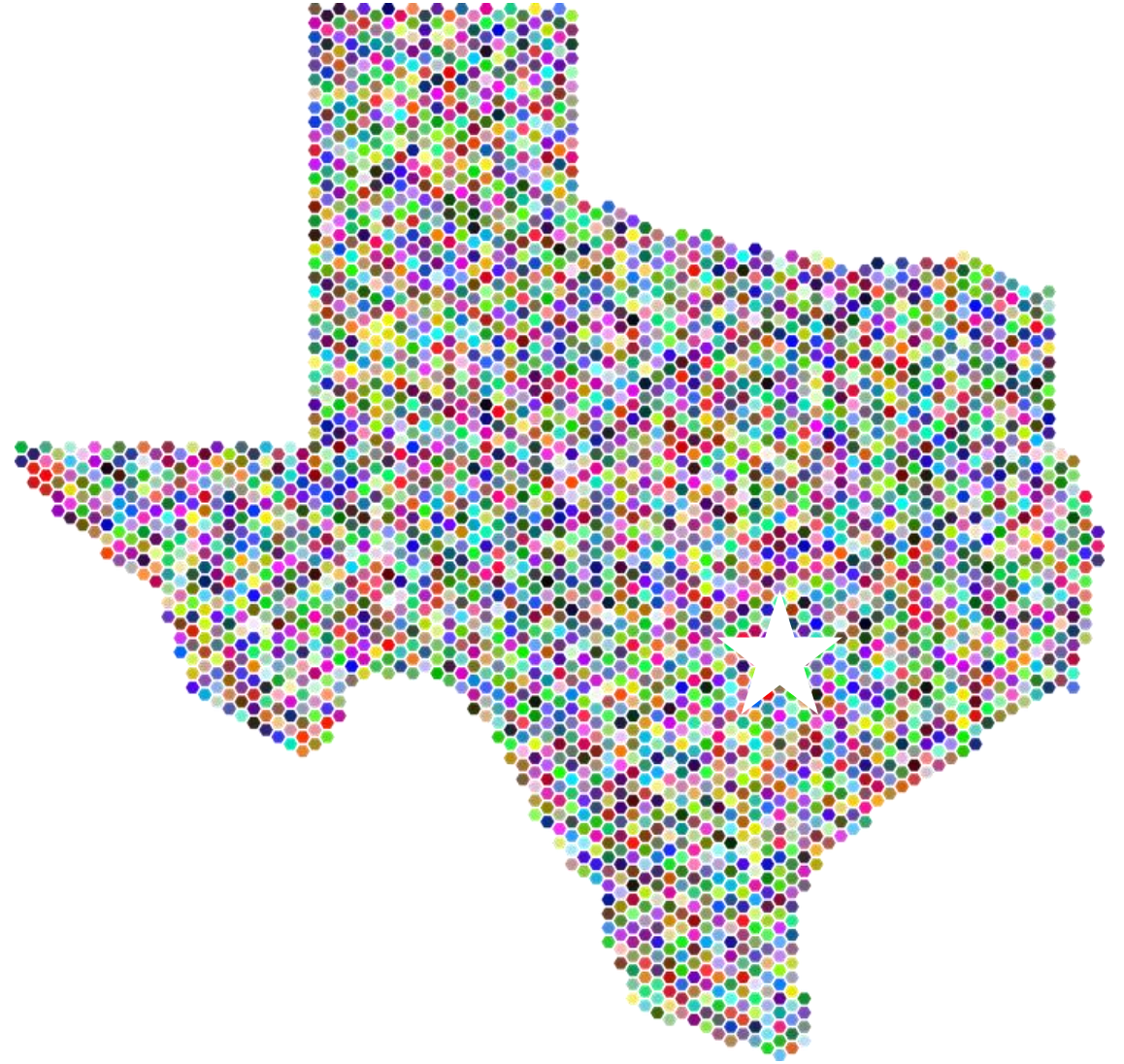


Take Charge Texas (TCT) User Engagement Session

May 9th, 2024



Meet the Facilitators

DSHS/HHSC TEAM



Charletha Joseph
Program Support



Rachel Sanor
HIV Care and
Medications Unit
Director



Christine Salinas
ADAP Regional
Manager



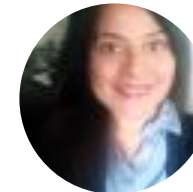
Janina Vazquez
HIV Care Services
Group Manager



Holly Benavides
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Medication Data and Analysis
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Sylvia Jimenez
THMP Group Manager

DELOITTE TEAM



Nikki Fernandes
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Meeta Sharma
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Hunter Chernyha
Team Lead/Scrum Master



Krishna Dixit
Consultant/Discovery



Alex Davis
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**](https://Pollev.com/tctdshsstaff)

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



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 Mpo 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.



SPRINT 15

Focused on separating out the eligibility application(s) by THMP and/or CARE services, as well as preventing Users from ending a Client's current eligibility due to applications pending processing. Furthermore, introduced enhanced features to the Pharmacy Portal and to the HAB, Clients Coming Up for Renewal, and Clients on Hold Reports.

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

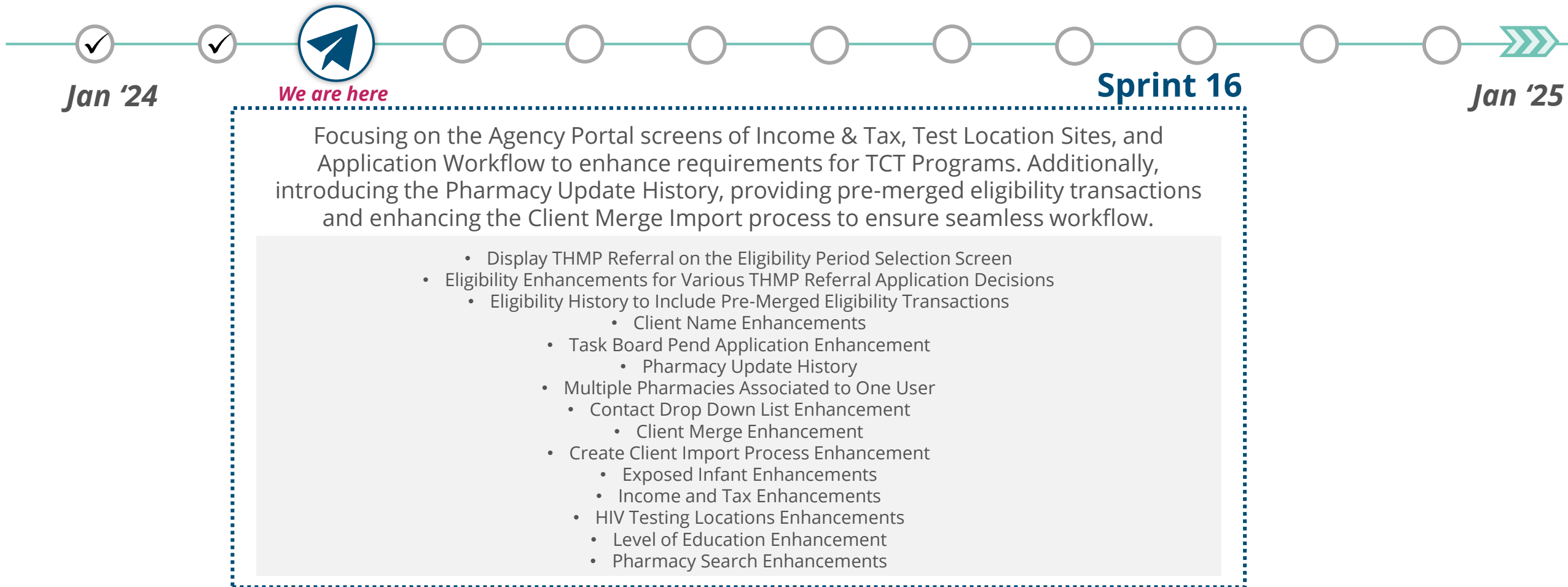
- RSR Completeness Report: Update Client IDs to Hyperlinks
- Pending Eligibility Report: Including CARE Filter
- Automating Task Status on Task Board
- STAR Report - Multiple Agency Selection
- STAR Report: Contract & Funding Source Filter Enhancements
- STAR Report: Viral Load & CD4 Count Category Enhancement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

Sprint 15

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

Project Plan: In Progress Features

The graphic below represents the features & user stories our team is currently consuming for Sprint 16.



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:
PolleEV.com/tctdshsstaff

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

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



System Overview: **New** TCT Features



Live Demonstration of TCT Features

TCT Features Video Presentation

- [Separate THMP and CARE Eligibility Periods, Eligibility Period Selection Page Enhancements: Displaying All Submitted Applications, Adding 6 Months to Eligibility Periods](#)
- [Preventing Users from Ending Current Eligibility Due to Applications Pending Processing](#)
- [Pharmacy Portal: Email Notifications When Placing Order for Multiple Pharmacies](#)
- [Addition of Pharmacy Site Information on Client Drug Screen](#)
- [Worker Performance Report: Application Submitted and Eligibility Processed](#)
- [HAB Report: Addition of Ethnicity Field](#)
- [Clients Coming up for Renewal Report Enhancements](#)
- [Clients on Hold Report](#)



Gathering Your Feedback



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 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



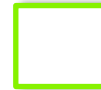
Upcoming Activities

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.

Thank You!

System Overview: **New** TCT Features



Feature Updates: Sprint 15

Eligibility Separate THMP and CARE Eligibility Processing

Once a User submits their completed application(s), the system will render the application(s) as separate Program record(s), if applicable. The logic which will be applied to render separate records for the applications is described below.

The screenshot shows the 'Eligibility Period' selection screen. At the top, it displays 'Client ID: 433638', 'Client Name: User, Test', and 'Client IDB: 06/06/2008'. Below this, a section titled 'Select why you are running eligibility.' contains a table with the following data:

	Program	Application Type	Application ID	Submitted By	Submitted On
☐ Select	THMP	New Application / Reapplication	2184800	Test User	04/17/2024

At the bottom left is a 'Back' button, and at the bottom right is a 'Continue' button.

If a User selects only THMP services on the 'My Needs' page of an application, a single record will be created on the Eligibility Period page and the 'Program' field on the Eligibility Period Selection screen will display THMP.

If a User selects only CARE services on the 'My Needs' page of an application, a single record will be created on the Eligibility Period page and the 'Program' field on the Eligibility Period Selection screen will display CARE.

The screenshot shows the 'Eligibility Period' selection screen. At the top, it displays 'Client ID: 433638', 'Client Name: Story, Test', and 'Client IDB: 06/26/2014'. Below this, a section titled 'Select why you are running eligibility.' contains a table with the following data:

	Program	Application Type	Application ID	Submitted By	Submitted On
☐ Select	CARE	New Application / Reapplication	2184799	Test Story	04/17/2024

At the bottom left is a 'Back' button, and at the bottom right is a 'Continue' button.

The screenshot shows the 'Eligibility Period' selection screen. At the top, it displays 'Client ID: 433638', 'Client Name: User, Test', and 'Client IDB: 06/06/2008'. Below this, a section titled 'Select why you are running eligibility.' contains two rows of data:

	Program	Application Type	Application ID	Submitted By	Submitted On
☐ Select	THMP	New Application / Reapplication	2184805	Test Street	04/17/2024
☐ Select	CARE	New Application / Reapplication	2184805	Test Street	04/17/2024

At the bottom left is a 'Back' button, and at the bottom right is a 'Continue' button.

If a User selects both THMP and CARE services on the 'My Needs' page of an application, the 'Program' field on the Eligibility Period Selection screen will display two records - one record indicating THMP in the 'Program' field and another record indicating CARE in the 'Program' field.

Feature Updates: Sprint 15

Eligibility Eligibility Period Selection Page Enhancements: Displaying All Submitted Applications

As the Eligibility Process is separated out by Program, when a User navigates to the 'Eligibility Period Selection' screen, the below enhancements will occur.

The Eligibility Period Selection screen will have the below additional fields:

- Application ID
- Program

The Eligibility Period Selection screen will now be updated to display all applications submitted by/for the Client.

The application records will display in ascending order based on the 'Submitted On' date.

When a Singular Program application (either THMP or CARE) services is submitted, there will be one row with a unique Application ID to indicate that it is one application with service(s) selected for only one Program.

The screenshot shows the 'Eligibility Period' selection screen. On the left, there is a radio button labeled 'Select why you are requesting eligibility'. To the right, there is a table with five columns: Program, Application Type, Application ID, Submitted By, and Submitted On. A single row is displayed with the following values: Program: CARE, Application Type: New Application / Reapplication, Application ID: 2104179, Submitted By: Test User, and Submitted On: 04/17/2024. A 'Back' button is on the bottom left, and a 'Continue' button is on the bottom right.

When a Dual Program application (both THMP and CARE) services are submitted, there will be two rows with the same Application ID to indicate that it is one application with both Program services selected.

The screenshot shows the 'Eligibility Period' selection screen. On the left, there is a radio button labeled 'Select why you are requesting eligibility'. To the right, there is a table with five columns: Program, Application Type, Application ID, Submitted By, and Submitted On. Two rows are displayed, both with the same Application ID: 2104005. The first row has Program: THMP, Application Type: New Application / Reapplication, Submitted By: Test User, and Submitted On: 04/17/2024. The second row has Program: CARE, Application Type: New Application / Reapplication, Submitted By: Test User, and Submitted On: 04/17/2024. A 'Back' button is on the bottom left, and a 'Continue' button is on the bottom right.

Feature Updates: Sprint 15

Eligibility Eligibility Period Selection Page Enhancements: Displaying All Submitted Applications Cont.

When selecting applications on the Eligibility Period Selection screen for Eligibility Processing, Users will be required to select the application with the earliest 'Submitted On' date within a particular Program.

- *This applies regardless of whether the current processing date is past the end date of the eligibility period.*
- THMP Users will have to process the THMP-specific application in the order the application was received.
- CARE Users will have to process the CARE-specific application in the order the application was received.

Eligibility Period

Select why you are running eligibility.

	Program	Application Type	Application ID	Submitted By	Submitted On
☐ Select	THMP	Referral	2149715	Ricardo Aguilar	08/08/2023
☐ Select	THMP	6-month review	2183891	Ricardo Aguilar	02/09/2024
☐ Select	CARE	6-month review	2183891	Ricardo Aguilar	02/09/2024
☐ Select	CARE	Annual update	2149710	Ricardo Aguilar	08/08/2023

When a User selects an application submitted on a later date before processing the application which was submitted earlier, the System will display the following message:

- “Please process the applications by the order of Submission Date.”

Eligibility Period

Please process the applications by the order of Submission Date.

Select why you are running eligibility.

	Program	Application Type	Application ID	Submitted By	Submitted On
☐ Select	CARE	6-month review	2172367	Maria Eva Ramirez	12/08/2023
☒ Select	CARE	Annual update	2137407	Maria Eva Ramirez	06/14/2023
☐ Select	I am processing a change for the client's current eligibility period because of a change made directly in the client's information (example: the client called in to report a change, new information became available through an interface, and other reasons). This eligibility processing is for THMP program.				

[Back](#) [Continue](#)

Feature Updates: Sprint 15

Eligibility Adding 6 Months to Eligibility Periods

As a TCT User, I want to be able to add 6 months to a Client's Eligibility Period when eligibility is processed within 3 months of the Client's half birth month or birth month, so that I can extend the Eligibility Period as needed.

Client Example

- Client submits a new application for both THMP and CARE services on 2/22/2024 with a birthday of February 22nd.
 - Date of Birth is captured in the 'About You' section of the application workflow.*
- TCT User then processes the Client's eligibility same-day (2/22/2024).
- Client's 'Application Decision Date' and 'Eligibility Start Date' then automatically default to 2/22/2024.
- Client's 'Eligibility End Date' then becomes 9/30/2024 as the Client's half birth month (August) comes before February (Birth Month).
 - The Eligibility Period duration for a particular Client will be dependent upon their Half Birth Month and Birth Month.*

Program	Sub-Program	Eligibility Decision Date	Eligibility Start Date	Eligibility End Date	Eligibility Status	Override	Immediate Denial	Override Comments	Eligibility Decision
CARE	RW Care	02/22/2024	02/22/2024	09/30/2024	Approved	Yes	No	AP	
THMP	ADAP	02/22/2024	02/22/2024	09/30/2024	Approved	Yes	No		

- On 7/1/2024 the Client then submits their eligibility Renewal/Recertification via their dashboard.
 - System notifies the Client 90 days prior to the Eligibility Start Date.*
- After the Client submits their Recertification, and the TCT User processes the application (processes the Client's eligibility) on 2/01/2025, the result will be that the Client's 'Application Decision Date' and 'Eligibility Start Date' will be updated to the transaction date.
- Because the TCT User processed the Client's eligibility within 3 months prior to the current Eligibility End Date, the system will automatically extend the Client's eligibility by 6 months. In this scenario, the Eligibility End Date will be 9/30/2025.
 - This logic is triggered when eligibility is processed within 3 months of the Client's half birth month or birth month and requires no action by the User.*

Program	Sub-Program	Eligibility Decision Date	Eligibility Start Date	Eligibility End Date	Eligibility Status	Override	Immediate Denial	Override Comments	Eligibility Decision
CARE	RW Care	02/01/2025	02/01/2025	09/30/2025	Approved	Yes	No	ap	
THMP	ADAP	02/01/2025	02/01/2025	09/30/2025	Approved	Yes	No		

Feature Updates: Sprint 15

Eligibility Preventing Users from Ending Current Eligibility Due to Applications Pending Processing

The following conditions must be met before the 'End THMP Eligibility' button on the Eligibility Summary screen will be enabled for Users to select.

End THMP Eligibility

- The Client **does not** have any pending THMP applications awaiting processing on the Eligibility Period Selection screen.

Eligibility Period

Select why you are missing eligibility.

☐ I am processing a change for the client's current eligibility period because of a change made directly to the client's information (example: the client called to report a change, new information became available through an interface, and other reasons). This eligibility processing is for THMP program.

[Back](#) [Continue](#)

- If a Client **does** have pending THMP applications awaiting processing, Users will not be able to select the 'End THMP Eligibility' button.

Eligibility Summary

This page is a read-only summary of the client's eligibility.

You have been evaluated for the following programs.

Current Eligibility Period:

Program	Sub-Program	Eligibility Decision Date	Eligibility Start Date	Eligibility End Date	Eligibility Status	Override	Immediate Denial	Override Comments	Eligibility Decision
CARE	NAL	08/01/2023	08/01/2023	04/30/2024	Approved	Yes	No		
THMP	ADAP	08/01/2023	08/01/2023	04/30/2024	Approved	Yes	No		

[End THMP Eligibility](#) [End CARE Eligibility](#)

The following conditions must be met before the "End CARE Eligibility" button on the Eligibility Summary screen will be enabled for Users to select.

End CARE Eligibility

- The Client **does not** have any pending CARE applications awaiting processing on the Eligibility Period Selection screen.

Eligibility Period

Select why you are missing eligibility.

☐ I am processing a change for the client's current eligibility period because of a change made directly to the client's information (example: the client called to report a change, new information became available through an interface, and other reasons). This eligibility processing is for THMP program.

[Back](#) [Continue](#)

- If a Client **does** have pending CARE applications awaiting processing, Users will not be able to select the 'End CARE Eligibility' button.

Eligibility Summary

This page is a read-only summary of the client's eligibility.

You have been evaluated for the following programs.

Current Eligibility Period:

Program	Sub-Program	Eligibility Decision Date	Eligibility Start Date	Eligibility End Date	Eligibility Status	Override	Immediate Denial	Override Comments	Eligibility Decision
CARE	NAL	08/01/2023	08/01/2023	04/30/2024	Approved	Yes	No		
THMP	ADAP	08/01/2023	08/01/2023	04/30/2024	Approved	Yes	No		

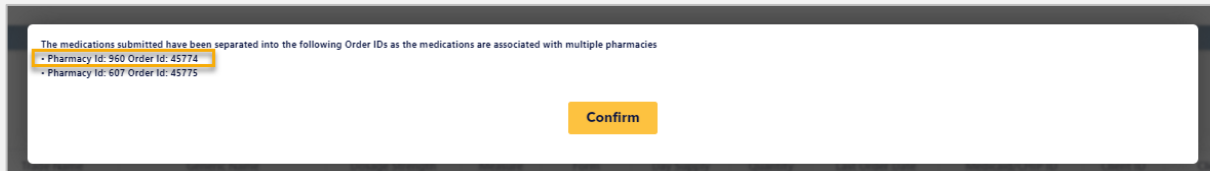
[End THMP Eligibility](#) [End CARE Eligibility](#)

Feature Updates: Sprint 15

Pharmacy Pharmacy Portal: Email Notifications When Placing Orders for Multiple Pharmacies

TCT Users with access to submit medication order(s) to multiple pharmacies, will receive an email notification with the Pharmacy IDs and Order IDs upon receiving confirmation that the order(s) have been placed.

- The email will be sent to the email address associated with the User's TCT account.
- The subject of the email will be: Multiple Pharmacy Order ID Update
- The body of the email message will be: "The medications submitted have been separated into the following Order IDs as the medications are associated with multiple pharmacies. Please login to HRAR to view the further details."
- Pharmacy ID: XXX, Order ID: ZZZZ
 - The line above will display for each Pharmacy ID and Order ID that is created as a result of the User's submitted order(s).
 - XXX indicates the Pharmacy ID that the TCT Admin or ADAP Order Processor places the order for.
 - ZZZZ indicates the Order ID associated with the Pharmacy ID.



^On screen notification received by the TCT Admin or ADAP Order Processor once order(s) is placed.

The medications submitted have been separated into the following Order IDs as the medications are associated with multiple pharmacies

- Pharmacy Id: 905 Order Id: 3069
- Pharmacy Id: 967 Order Id: 3070

Please login to <https://sit1.ap.dshs.texas.gov> to view the further details.

^Email notification received by the TCT Admin or ADAP Order Processor.

Feature Updates: Sprint 15

Pharmacy Addition of Pharmacy Site Information on Client Drug Screen

When a User navigates to the 'Client Drug Regimen' screen, the below new columns will display in the results table.

- Pharmacy Site Type
 - Primary
 - Secondary
 - Both
- Pharmacy Name
 - The 'Pharmacy Site' will include both the Pharmacy Code and the Pharmacy Name in the below format, for example:
 - 674 – Amex Pharmacy

Both Pharmacy Site Type and Pharmacy Name columns will display a value once medication(s) are added to the Client's Drug Regimen screen, **and** have a pharmacy assigned to them via the Assign/Change Pharmacy screen.

Prescribed Drugs

TX MEDSOT Client #1 Doctor Name:

Status:

[Search Doctor](#) [Add Prescription](#)

Pharmacy Site Type	Pharmacy Name	Trade Name	Generic Name	Dosage Strength	Measure	Form	Count As	Day Supply	Dosage Frequency	TX MEDSOT License #	New Drug to Client?	Status	Approval Date	Regimen Drop Date	Drop?
Primary	657 - MID NEW CLIENTS C/S pharmacy #5876	VIRAMUNE OS (240m/81)	Nevirapine OS	50	MG'S ML	SUPP	1	30		CONV0002		Approved	06/17/2024	--	Show
Primary	657 - MID NEW CLIENTS C/S pharmacy #5876	VIOXX CHEWABLE	Diclofenac (200)	100	MG	TAB CHW	1	30		CONV0002	Yes	Approved	06/17/2024	--	Show

Showing rows 1 to 2 of 2 [Add Rows](#)

Pharmacy Site Type Logic:

- When a medication with 'Drug Requires Override' equals to "No" is added to the Client's Drug Regimen screen, the Pharmacy Site Type column will display the value saved/assigned to the Client's Primary Pharmacy (on the 'Assign/Change Pharmacy' screen), for the 'Site Usage Designation' field of that particular pharmacy (on the 'Pharmacy Details' screen).
- When a medication with 'Drug Requires Override' equals to "Yes" is added to the Client's Drug Regimen screen, the Pharmacy Site Type column will display the value saved/assigned for the Client's Secondary Pharmacy (on the 'Assign/Change Pharmacy' screen), for the 'Site Usage Designation' field of that particular pharmacy (on the 'Pharmacy Details' screen).
- In a scenario where the 'Drug Requires Override' equals "No", and the Client has two (2) different Primary and Secondary pharmacies assigned (the primary pharmacy with a site type of 'Primary' and a secondary pharmacy with a site type of 'Both'), the primary pharmacy will take precedence, and the Pharmacy Site Type and Pharmacy Name will be of the pharmacy assigned as Primary Pharmacy.
- In a scenario where the 'Drug Requires Override' equals "Yes", and the Client has two (2) different Primary and Secondary pharmacies assigned (the primary pharmacy with a site type of 'Both' and a secondary pharmacy with a site type of 'Secondary'), the secondary pharmacy will take precedence, and the Pharmacy Site Type and Pharmacy Name will be of the pharmacy assigned as Secondary Pharmacy.

Feature Updates: Sprint 15

Reports Worker Performance Report: Application Submitted and Eligibility Processed

The name of the 'Worker Performance Report: Applications Processed' has been updated to 'Worker Performance Report: All Applications'. When a TCT User first navigates to the updated Worker Performance Report: All Applications screen, the below two new required fields will display along with pre-existing fields:

- Search By
- Aggregate By

Upon clicking the new mandatory 'Search By' field, the User must select an option from the picklist values below for the single-select drop down:

- Agency
- Individual Worker

If User selects 'Agency' in the Search By field, the below logic will occur:

- A new required field titled 'Agency Level' will display in which the User must select a value from the picklist below for the single-select drop down:
 - Admin Agency
 - Provider Agency

If the User selects 'Admin Agency' in the Agency Level field, the below logic will occur:

- A new required field titled 'Admin Agency' will display in which the User must select an active Admin Agency from the picklist values for the single-select drop down.

If the User selects 'Provider Agency' in the Agency Level field, the below logic will occur:

- A new required field titled 'Provider Agency' will display in which the User must select an active Provider Agency from the picklist values for the multi-select drop down.

The screenshot shows the 'Worker Performance Report : All Applications' form. Under 'Search Criteria', the 'Search By' field is set to 'Agency', 'Format' is 'PDF', and 'Agency Level' is 'Admin Agency'. The 'Admin Agency' dropdown menu is open, showing a list of agencies including '4812 - Austin-Travis County HHS HIV AA2', '4812 - Austin-Travis County HHS HIV Administrative Agency', 'Super BVCOC', 'Super Dallas/Sherman', and 'Super Ft. Worth/Ablene/Wichita Falls'. The 'Aggregate By' field is set to 'Select'. There are 'Generate' and 'Reset' buttons at the bottom right.

^When Admin Agency is selected in the Agency Level field.

The screenshot shows the 'Worker Performance Report : All Applications' form. Under 'Search Criteria', the 'Search By' field is set to 'Agency', 'Format' is 'PDF', and 'Agency Level' is 'Provider Agency'. The 'Provider Agency' dropdown menu is open, showing a list of agencies including '4801 - Panhandle AIDS Support Organization', '4802 - (Inactive) Premier Family Care', '4802 - Basin Assistance Services', '4803 - (Inactive) Community HealthCare Center, Inc.', and '4803 - (Inactive) David Sabine, PhD'. The 'Aggregate By' field is set to 'Select'. There are 'Generate' and 'Reset' buttons at the bottom right.

^When Provider Agency is selected in the Agency Level field.

Feature Updates: Sprint 15

Reports Worker Performance Report: Application Submitted and Eligibility Processed Cont.

If the User selects 'Individual Worker' in the Search By field, the below logic will occur:

- Two new required fields titled 'Provider Agency' and 'Individual Worker' will display in which the User must select an active Provider Agency from the picklist values for the single-select drop down, as well as an Individual Worker based on the Provider Agency selected.

Upon clicking the new mandatory 'Aggregate By' field, the User must select an option from the picklist values below for the single-select drop down:

- Application Submitted
- Eligibility Processed

If the User selects 'Application Submitted' in the Aggregate By field, the below logic will occur:

- A new required field titled 'Application Submitted Date' will display in which the User must select an option from the picklist below for the single-select drop down before providing the dates (regardless of whether 'Agency' or 'Individual Worker' is selected in the "Search By" field).
 - The following picklist values will be available for selection:
 - Between
 - Equal to
 - Greater than
 - Less than
 - Once selecting one of the above options, the User can then enter their date range(es) in the MM/DD/YYYY format.

Feature Updates: Sprint 15

Reports Worker Performance Report: Application Submitted and Eligibility Processed Cont.

If the User selects 'Eligibility Processing' in the Aggregate By field, the below logic will occur:

- A new required field titled 'Eligibility Decision Date' will display in which the User must select an option from the picklist below for the single-select drop down before providing the dates (regardless of whether 'Agency' or 'Individual Worker' is selected in the "Search By" field).
 - The following picklist values will be available for selection:
 - Between
 - Equal to
 - Greater than
 - Less than
 - Once selecting one of the above options, the User can then enter their date range(es) in the MM/DD/YYYY format.

Worker Performance Report : All Applications

Search Criteria

Search By *

Agency

Format *

PDF

Agency Level *

Provider Agency

Provider Agency *

Select an Option

Aggregate By *

Eligibility Processed

Eligibility Decision Date *

Between

Start Date *

04/01/2024

End Date *

04/22/2024

Generate

Reset

Upon exporting the updated Worker Performance Report: All Applications report, the results table in the output will include the below new columns:

- Application Submission Date
- Worker Name

THMP															
Worker Performance Report: All Applications															
Report Date: 4/15/2024															
New Applications: 37 Re-certification: 209 Referrals: 40															
Change Request: 18 Self-Attestations: 210 Total: 514															
Client Id	Client Name	Client DOB	Application Type	Application Id	Application Submitted By	Application Submission Date	Worker Name	Submitted Portal	Program	CARE Sub Program	THMP Sub Program	Eligibility Reason	Override	Eligibility Decision	Decision Date
1000001	John Doe	12/12/1980	Self-Attestation	1000001	John Doe	04/15/2024	John Doe	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024
1000002	Jane Smith	01/01/1985	Self-Attestation	1000002	Jane Smith	04/15/2024	Jane Smith	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024
1000003	John Doe	12/12/1980	Self-Attestation	1000003	John Doe	04/15/2024	John Doe	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024
1000004	Jane Smith	01/01/1985	Self-Attestation	1000004	Jane Smith	04/15/2024	Jane Smith	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024
1000005	John Doe	12/12/1980	Self-Attestation	1000005	John Doe	04/15/2024	John Doe	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024
1000006	Jane Smith	01/01/1985	Self-Attestation	1000006	Jane Smith	04/15/2024	Jane Smith	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024
1000007	John Doe	12/12/1980	Self-Attestation	1000007	John Doe	04/15/2024	John Doe	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024
1000008	Jane Smith	01/01/1985	Self-Attestation	1000008	Jane Smith	04/15/2024	Jane Smith	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024
1000009	John Doe	12/12/1980	Self-Attestation	1000009	John Doe	04/15/2024	John Doe	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024
1000010	Jane Smith	01/01/1985	Self-Attestation	1000010	Jane Smith	04/15/2024	Jane Smith	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024
1000011	John Doe	12/12/1980	Self-Attestation	1000011	John Doe	04/15/2024	John Doe	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024
1000012	Jane Smith	01/01/1985	Self-Attestation	1000012	Jane Smith	04/15/2024	Jane Smith	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024
1000013	John Doe	12/12/1980	Self-Attestation	1000013	John Doe	04/15/2024	John Doe	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024
1000014	Jane Smith	01/01/1985	Self-Attestation	1000014	Jane Smith	04/15/2024	Jane Smith	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024
1000015	John Doe	12/12/1980	Self-Attestation	1000015	John Doe	04/15/2024	John Doe	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024
1000016	Jane Smith	01/01/1985	Self-Attestation	1000016	Jane Smith	04/15/2024	Jane Smith	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024
1000017	John Doe	12/12/1980	Self-Attestation	1000017	John Doe	04/15/2024	John Doe	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024
1000018	Jane Smith	01/01/1985	Self-Attestation	1000018	Jane Smith	04/15/2024	Jane Smith	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024
1000019	John Doe	12/12/1980	Self-Attestation	1000019	John Doe	04/15/2024	John Doe	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024
1000020	Jane Smith	01/01/1985	Self-Attestation	1000020	Jane Smith	04/15/2024	Jane Smith	Self-Attestation	THMP			Eligibility Processed	No	Eligibility Processed	04/15/2024

Feature Updates: Sprint 15

Reports HAB Report: Addition of Ethnicity Field

Users landing on the HAB Report screen will see a new optional field titled 'Ethnicity' which will display beneath the 'Race' field with the below picklist values for the multi-select drop down.

- *This filter will be mapped to the 'Are you Hispanic?' question on the 'About You' page in the application workflow.*
- Hispanic
- Non-Hispanic
- Not Specified
- All

HAB QM Indicators - Filters

Reporting Period End Date: 12/31/2023

Are you viewing the report for a specific measure? ☐ No ☐ Yes

Reporting on measures:

Select

Funding Source:

Select

County:

Select

Location:

Select

Add more filters to the report

Client Age Range Start:

Select

Client Age Range End:

Select

Sex:

Select

Ethnicity:

Select

County:

Select

Client status:

Select

- The 'Ethnicity' column will display a value of 'Hispanic' if the User had selected 'Yes' to the question of 'Are you Hispanic?' on the 'About You' screen in the Client profile.
- The 'Ethnicity' column will display a value of 'Non-Hispanic' if the User had selected 'No' to the question of 'Are you Hispanic?' on the 'About You' screen in the Client profile.
- The 'Ethnicity' column will display a value of "--" if the User had not selected either 'Yes' or 'No' to the question of 'Are you Hispanic?' on the 'About You' screen in the Client profile.

HAB Follow Up Export

Export from 4/1/2023 to 4/1/2024

HAB Measures View

Client ID	First Name	Last Name	Middle Name	Is Shared	Age	Gender	Sex At Birth	County	Geographic Area	Zip	Race	Ethnicity	Language Primary	Date of HIV Diagnosis	Risk Factor
1000001	Robert	Williams		Yes	55	Male	Male	California	--	90001	White	Non-Hispanic	English	11/16/2001	Male to Male sex contact (2000-2009)
1000002	David	Thompson		Yes	45	Female	Male	Illinois	Midwest/Chicago	60606	White	Non-Hispanic	English	05/15/2004	Injection drug use
1000003	David	Johnson		Yes	55	Male	Male	Illinois	--	60606	White	Non-Hispanic	English	01/15/2001	Injection drug use (2000-2009)

Feature Updates: Sprint 15

Reports Clients Coming Up for Renewal Enhancements

Users navigating to the 'Clients Coming Up for Renewal Report' will now be able to render Clients with the CARE Program who are up for renewal.

The below user roles will be given access to this report:

- Data Entry (Read and Write)
- Agency Admin Staff (Read)

The HOPWA Case Manager's role access will be removed from this report.

New optional search criteria fields include:

- Agency
- Program
- Renewal Type
- Client ID
- Subprogram
- Contact Preference
 - *This field will be mapped to the 'Contact Preference' page in the application workflow.*

Clients Coming Up For Renewal Report

Search Criteria

Report Date *
MM/DD/YYYY

Agency
Select an Option

Program
Select an Option

Renewal Type
Select an Option

Client ID
Select an Option

Sub Program
Select an Option

Contact Preferences
Select an Option

Search Clear Search

Upon exporting the 'Clients Coming Up for Renewal Report', the results table will have the following updates.

- *All the above updates will be applicable to the 'Accessible View' report screen.*
 - The current Program column will be renamed to 'Subprogram' and will display the Subprogram the Client was approved for.
 - A new column titled 'Program' will display the THMP and/or CARE Program(s) the Client was approved for.
 - A new column titled 'Current Eligibility End Date' will display the end date of the Client's current eligibility period.
 - The Client ID column will include a hyperlink to the Client's dashboard.
- If a Client is coming up for both THMP and CARE Recertification or Self-Attestation application renewals, the report will display two records for the Client.
- The additional columns in the report output will be available on the Scheduled Report.

data_export.xlsx - Protected View - Saved to this PC

	A	B	C	D	E	F	G	H	I
1	Renewal Type	Program	Sub Program	Client ID	First Name	Last Name	Contact Preferences	Current Eligibility End Date	Primary Address
2	Recertification	THMP	SPAP				Email,Mail,Primary Phone	05/31/2024	
3									
4									
5									
6									
7									

Feature Updates: Sprint 15

Reports Clients on Hold Report

There will be a new report for Users titled 'Clients on Hold Report'.

The following user roles will have access to the Clients on Hold Report:

- HRAR_Admin
- DSHS_Program_Staff

The Clients on Hold Report will render Clients who are on hold at the time the report is generated and will show Active Clients only.

The following search criteria fields will display on screen:

- Client ID
- Hold Type
 - Manual
 - Automatic
 - Both
- Hold Reason
 - Returned Mail
 - Insurance Hold
 - SPAP Hold
 - Inactivity Hold
 - Recertification / Self Attestation Hold
 - Other
 - All
- Format

The screenshot shows the 'Clients On Hold Report' form. At the top, a yellow-bordered box contains a help message: "This report will render clients who are on hold at the time of report curation. The records displayed in this report are indicative of clients that are currently on hold and will not display historical data for clients that were previously on hold but have since had the hold removed." Below this, the form includes input fields for 'Client ID', 'Hold Type' (a dropdown menu), and 'Hold Reason' (a dropdown menu). There is also a 'Format' dropdown menu. At the bottom right, there are 'Generate' and 'Reset' buttons. A 'Back' button is located at the bottom left.

^A Help Text informational message will appear beneath the title when generating the report: "This report will render clients who are on hold at the time of report curation. The records displayed in this report are indicative of clients that are currently on hold and will not display historical data for clients that were previously on hold but have since had the hold removed."

The screenshot shows the 'Clients On Hold Report' form with a validation message highlighted. A yellow banner at the top contains the message: "Please select at least one search filter before proceeding." Below this, the form includes input fields for 'Client ID', 'Hold Type' (a dropdown menu), and 'Hold Reason' (a dropdown menu). There is also a 'Format' dropdown menu. At the bottom right, there are 'Generate' and 'Reset' buttons. A 'Back' button is located at the bottom left.

The following validation message will display on screen if the User clicks on 'Generate' without selecting any search criteria: "Please select at least one search filter before proceeding."

Feature Updates: Sprint 15

Reports Clients on Hold Report Cont.

- The report will display a 'Generation Date' for the date the report was ran.
- The order of records in the report output will be in descending order (latest hold record will be on top).
- As this report will be accessible to Admin level user roles, Clients with Share Status of 'Yes' and 'No' will be displayed on this report.



TEXAS

Health and Human Services

Texas Department of State Health Services

THMP TakeChargeTexas

Generated On :4/18/2024

Clients on Hold Report

ClientId	Client Name	Client DOB	THMPSub Program	Hold Type	Hold Reason	Hold Date	Hold Placed By	Hold Comments
400001	Juan Garcia	9/26/1986	ADAP	Automatic	Recertification/Self-Attestation Hold.	4/16/2024	System	
400002	Juan, Douglas	3/26/1982	ADAP	Automatic	Recertification/Self-Attestation Hold.	4/16/2024	System	
400004	Mark Johnson	9/26/1987	ADAP	Automatic	Recertification/Self-Attestation Hold.	4/1/2024	System	
400005	Rodolfo, Linares	9/26/1982	ADAP	Automatic	Recertification/Self-Attestation Hold.	4/1/2024	System	
400007	David, Ojeda	3/24/1982	ADAP	Automatic	Recertification/Self-Attestation Hold.	4/1/2024	System	
400010	Walter, Sanchez	3/27/1986	ADAP	Automatic	Recertification/Self-Attestation Hold.	4/1/2024	System	
400014	Juan, Torres	9/10/1976	ADAP	Automatic	Recertification/Self-Attestation Hold.	4/1/2024	System	
400017	Juan, Hernandez	3/2/1983	ADAP	Automatic	Recertification/Self-Attestation Hold.	4/1/2024	System	