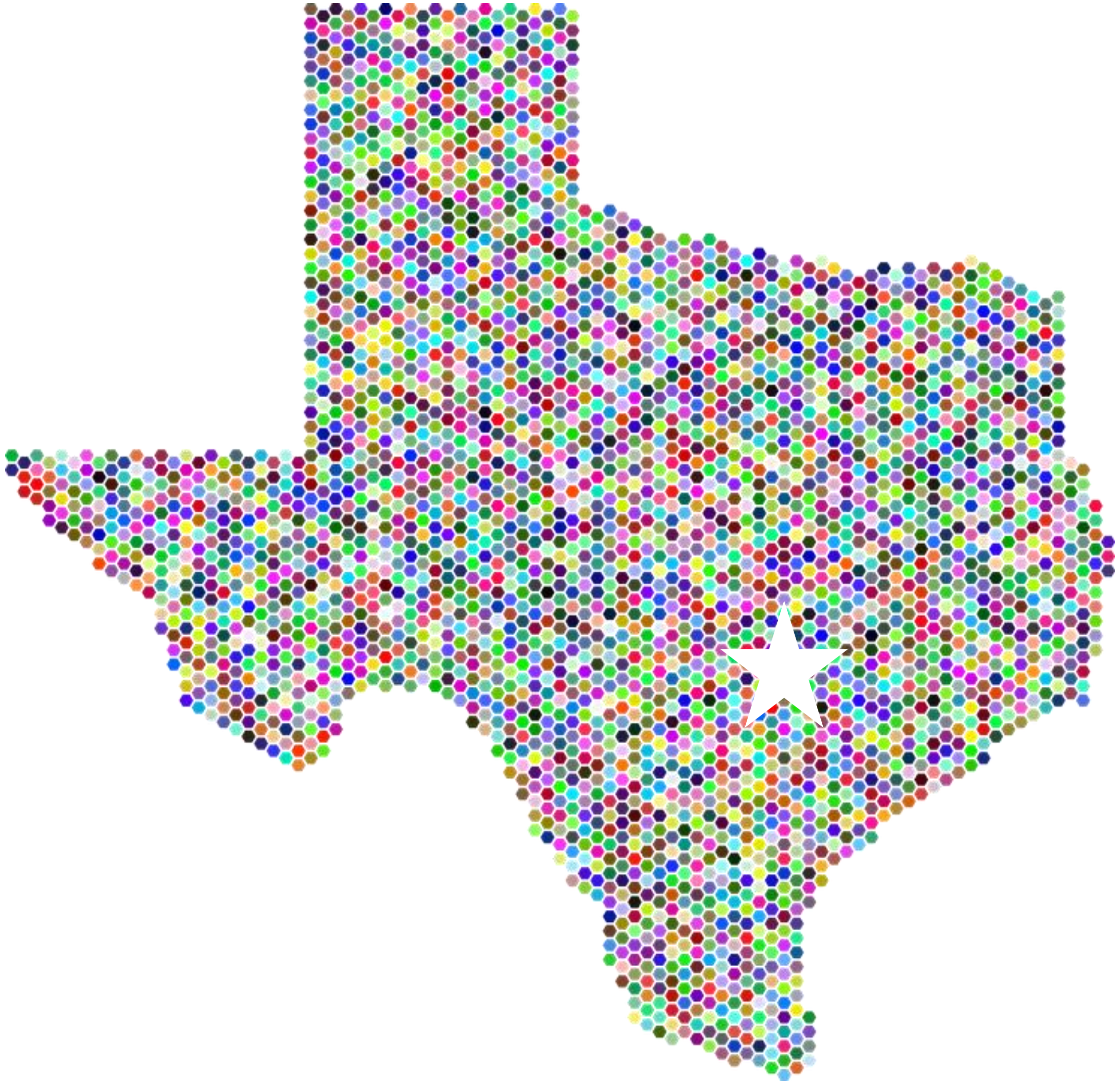


Take Charge Texas (TCT) User Engagement Session

June 6th, 2024

Meet the Facilitators

DSHS/HHSC TEAM

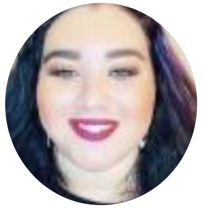
Charletha Joseph
Program Support

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

Hunter Chernyha
Team Lead/Scrum Master

Meeta Sharma
Test Lead

Krishna Dixit
Consultant/Discovery

Alex Davis
Analyst/Discovery

Agenda

1 Introduction & Overview of Objectives

2 TCT Roadmap of Deployed Enhancement Features

3 TCT In Progress Enhancement Features

4 System Overview: New TCT Features

5 Gathering Your Feedback

6 Close Out & Next Steps

How to Ask Questions:

All lines are muted.

We will save time for your feedback & questions throughout the presentation. Please come off mute and ask questions at that time!

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 of Deployed Enhancement Features

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.

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.

Sprint 16

Focused on displaying THMP referral applications on the Eligibility Period Selection page, implemented pre-merged eligibility transactions to the Eligibility History screen, and enabled enhancements for Income & Tax, Level of Education, Exposed Infant, HIV/AIDS Test Location Sites, Client Name, Task Board, Contracts, and Pharmacy Search priorities.

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

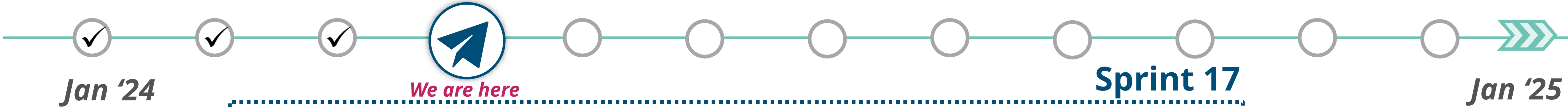
Sprint 15
- Separate THMP and CARE Eligibility Processing
- Eligibility Period Selection Page Enhancements: Displaying All Submitted Applications
- Adding 6 Months to Eligibility Periods
- Preventing Users from Ending Current Eligibility Due to Applications Pending Processing
- Pharmacy Portal: Email 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

Sprint 16
- Display THMP Referral on the Eligibility Period Selection Screen
- Eligibility Enhancements for Various THMP Referral Application Decisions
- Client Name Enhancements
- Eligibility History to Include Pre-Merged Eligibility Transactions
- Task Board Pend Application Enhancement
- Pharmacy Update History
- Multiple Pharmacies Associated to One User
- Contract Drop-Down List Enhancement
- Client Merge Enhancement
- Create Client Import Process Enhancement
- Exposed Infant Enhancements
- Income & Tax Enhancements
- HIV & AIDS Test Location Enhancements
- Level of Education Enhancement
- Pharmacy Search Enhancements

TCT In Progress Enhancement Features

Project Plan: In Progress Features

The graphic below represents the features & user stories our team is currently consuming for Sprint 17.



Focusing on generating notifications for Task Board Updates, Pharmacy Orders and Order Override Submissions, and Deactivated Pharmacies so Users are informed of the actions made to a Client's profile. Implementing enhancements to the Ad Hoc and HAB Report outputs to display selected criteria concisely and cohesively. Enabling the ability for Users to delete Client Service entries when not applicable and enhancing the requirements for the Create Client Import process to allow multiple AIDNs upon a successful file import.

- Notification for Pharmacy Orders & Order Overrides Submission
- Pharmacy Assignment & Deactivation Notification Enhancement
- Pharmacy Banner Enhancements
- Ad Hoc Report Export Enhancements
- HAB Report Export Enhancements
- Medicaid Match Report
- Clients with Medicaid Insurance Report
- Task Board Export Enhancements
- Notification for Task Board Updates
- Ability to Delete Service Entries
- Create Client Import Changes with Multiple AIDNs
- Verification Checklist Screen

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 applicable rank to submit your answer.

System Overview: New TCT Features

Live Demonstration of TCT Features

TCT Features Video Presentation

- Display THMP Referral on the Eligibility Period Selection Screen & Eligibility Enhancements for Various THMP Referral Application Decisions
- Client Name Enhancements
- Eligibility History to Include Pre-Merged Eligibility Transactions
- Task Board Pend Application Enhancement
- Pharmacy Update History Enhancements
- Multiple Pharmacies Associated to One User
- Contract Drop Down List Enhancement
- Client Merge Enhancement
- Create Client Import Process Enhancement
- Exposed Infant Enhancements
- Income & Tax Enhancements
- HIV & AIDS Test Location Enhancements
- Level of Education Enhancement
- Pharmacy Search Enhancements

Gathering Your Feedback

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

How to Provide Feedback to TCT?

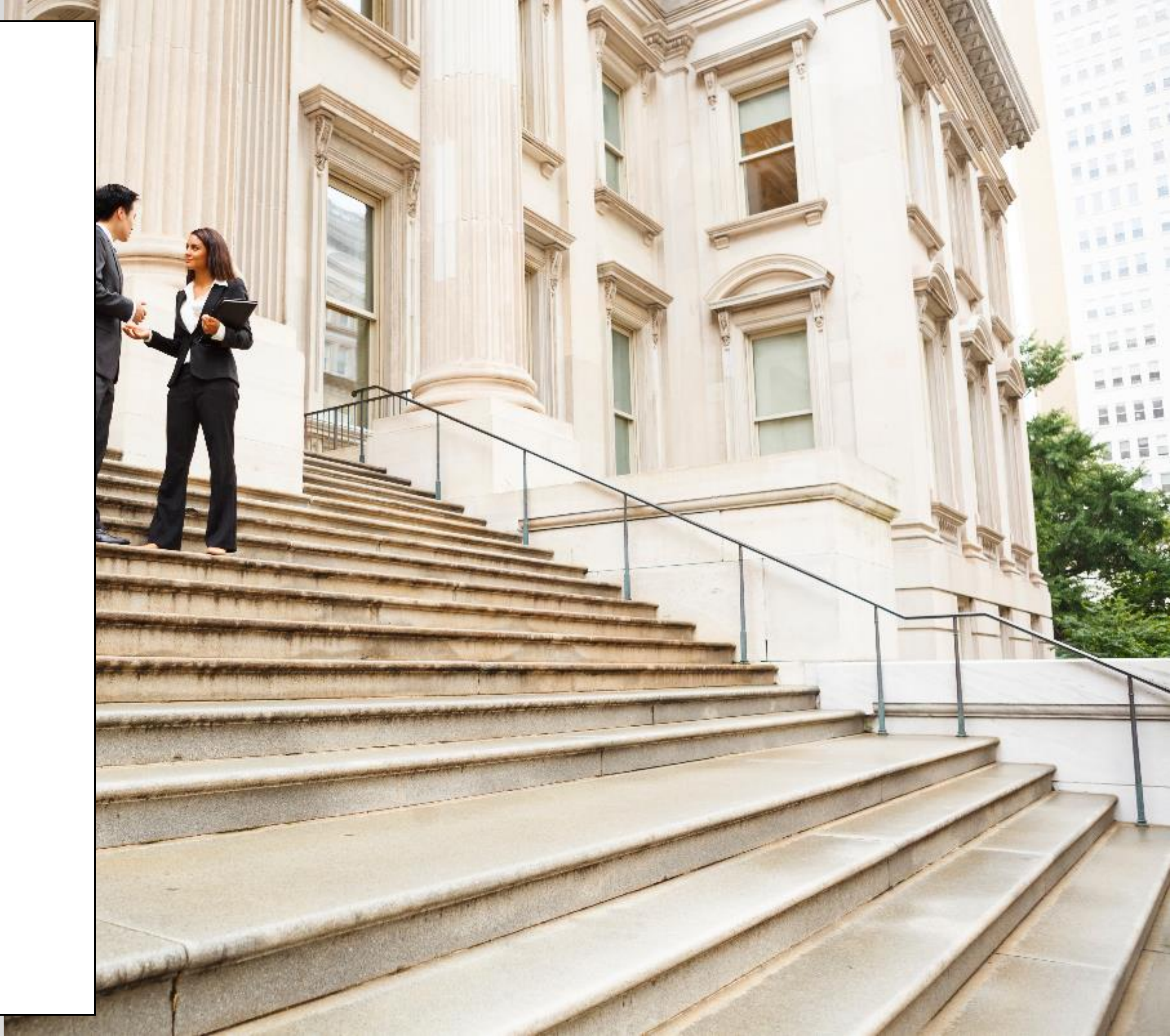
The **TakeChargeTexas Portal**, is a system with a goal to benefit all end users – providers, admins and clients. To achieve future growth and scale, **we request you to provide your suggestions and feedback.**

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.

 |

Thank You!

System Overview: New TCT Features

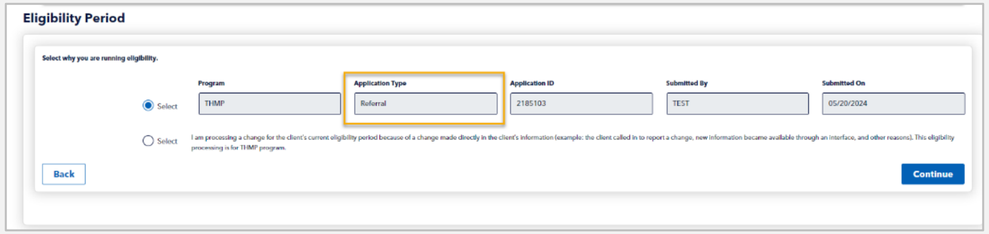
Feature Updates: Sprint 16

Eligibility Display THMP Referral on the Eligibility Period Selection Screen

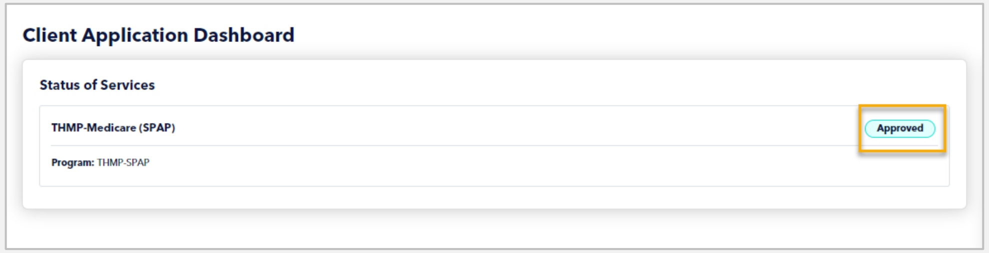
When a TCT User navigates to the Eligibility Period Selection screen within a Client's profile, they will be able to view, select, and process the submitted referral application for an already approved THMP Client.

Pre-Conditions:

- When a Client who is 'Approved' for THMP has a subsequent referral submitted for an additional subprogram (ADAP, SPAP, and/or TIAP), the following logic will occur on the Eligibility Period Selection screen.
  - The referral application will display the system generated values for the Program, Application Type, Application ID, Submitted By, and Submitted On columns.



  - Once the User approves the subprogram referral, the referral will then take precedence over the previously approved subprogram and will show as the latest transaction on the Client Dashboard.



  - The same logic will apply to Deny / Pend / and Reject referral scenarios as the Client Dashboard will reflect the latest eligibility transaction.

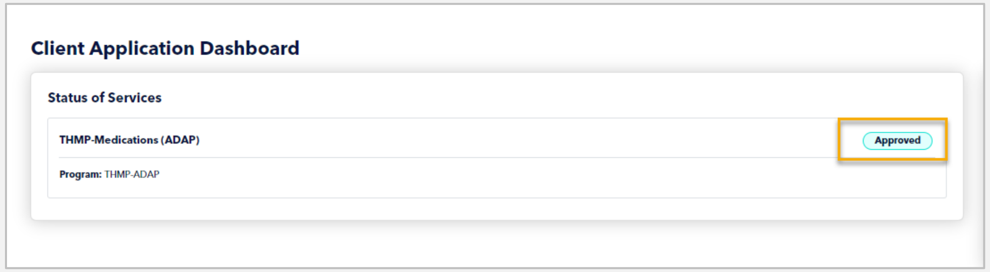
Feature Updates: Sprint 16

Eligibility Eligibility Enhancements for Various THMP Referral Application Decisions

When a TCT User processes a THMP referral application, with the referral application now being displayed on the Eligibility Period Selection screen, the following updates will occur on the Client Dashboard.

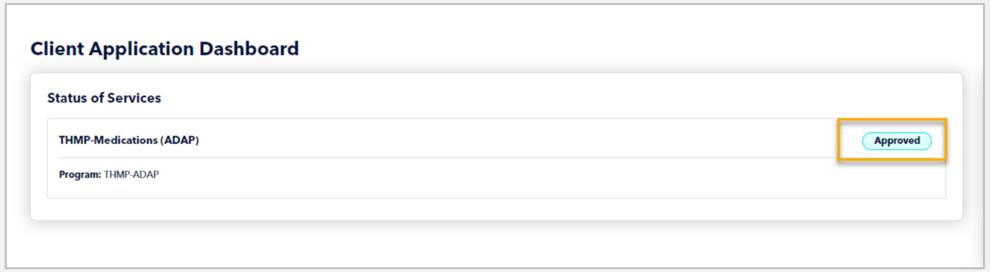
<u>Scenario 1:</u> Client is Approved for a THMP new application and submits a subsequent THMP referral.

- Client Dashboard will only display the ‘Approved’ status for the new application and will NOT display the subsequent referral application.
  - *Assuming no action has been taken on the referral submission*



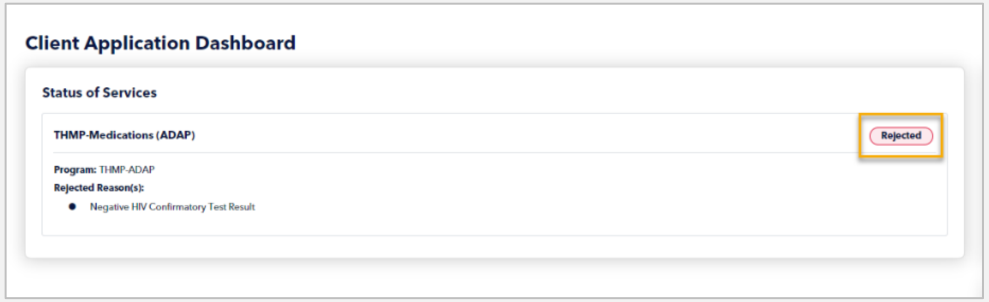
<u>Scenario 3:</u> Client is Rejected / Denied / or Pended for a THMP application type (new application, recertification, self-attestation, change request, referral) and submits a subsequent THMP referral.

- Client Dashboard will only display the ‘Rejected’ / ‘Denied’ / or ‘Pended’ status for the application and will NOT display the subsequent referral application.
  - *Assuming no action has been taken on the referral submission*



<u>Scenario 2:</u> Client is Approved for a THMP application type (new application, recertification, self-attestation, change request, referral) and submits a subsequent THMP referral.

- Client Dashboard will only display the ‘Approved’ status for the application and will NOT display the subsequent referral application.
  - *Assuming no action has been taken on the referral submission*



^In the above scenarios identified, the subsequent THMP referral(s) will display on the Eligibility Period Selection screen for the User to process eligibility.

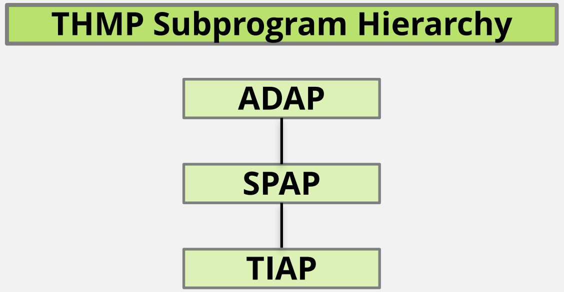
Feature Updates: Sprint 16

Eligibility Eligibility Enhancements for Various THMP Referral Application Decisions Cont.

Client Dashboard Enhancement Expectations:

- When a single THMP subprogram (ADAP, SPAP, or TIAP) is selected in the new application, whichever subprogram is selected, will display on the Client Dashboard.

- When two or more THMP subprograms (ADAP, SPAP, and/or TIAP) are selected in the new application, the hierarchy logic will be applied to the subprogram combinations which will display on the Client Dashboard: **ADAP > SPAP > TIAP.**



- When a subsequent referral is submitted after the THMP new application, but the new application has yet to be processed and is in ‘Pending’ status, the Client Dashboard will display the subprogram selected in the new application and will NOT display the referral.

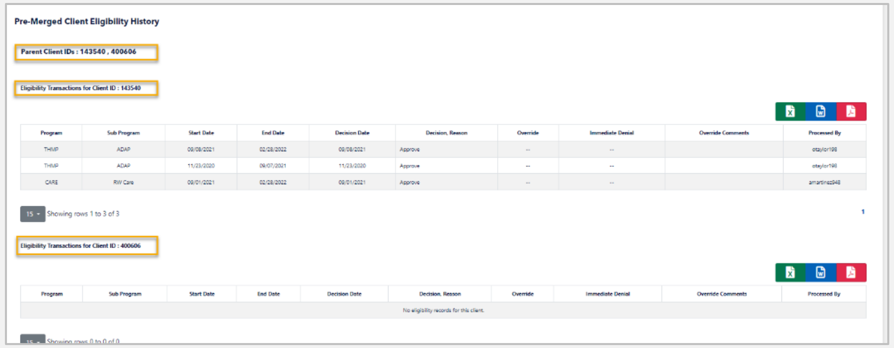
Feature Updates: Sprint 16

Eligibility Eligibility History to Include Pre-Merged Eligibility Transactions

When a TCT User navigates to a newly merged Client ID, the User will now find a history log of the current and previous eligibility transactions on the Eligibility History screen.

Pre-Conditions:

- Upon a successful Client Merge, the User searches for the newly merged Client ID and navigates to the Eligibility History screen.
- Under the Eligibility History title, the User will find a results table displayed on screen titled 'Current Eligibility History' indicating the Client's current eligibility transactions.
- Under the Current Eligibility History results table, a new section will now appear titled 'Pre-Merged Client Eligibility History' displaying the transaction history of the pre-merged client.
- The Pre-Merged Eligibility History section will contain the Parent Client IDs for the pre-merged client (Client ID 1 & Client ID 2) in the following formats.
    - Eligibility Transaction for Client ID: ######
        - *'######' represents the pre-merged Parent Client IDs*
        - *This same format is applicable to both pre-merged Client ID 1 and Client ID 2*
- The Eligibility Transaction sub sections, found under the Pre-Merged Eligibility History section, will include the following columns:
    - Program
    - Subprogram
    - Start Date
    - End Date



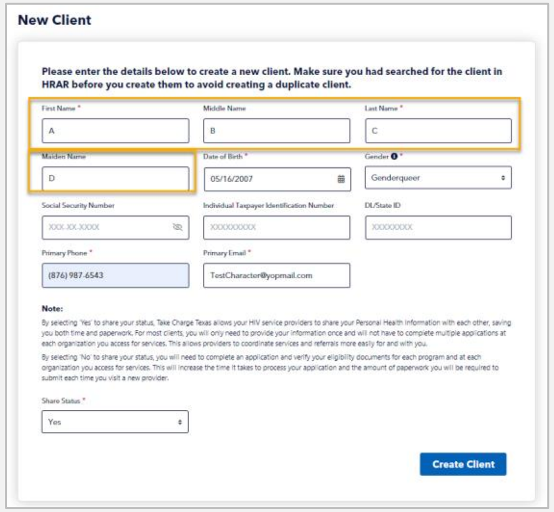
Things to Note:

- The Pre-Merged Client Eligibility History sections/tables will function in the same way as the Current Eligibility History table.
- The Pre-Merged Client Eligibility History section will display the previous 3 rounds of Client Merge.
    - *Whether it was an Automated or Manual Merge*
- The Pre-Merged Client Eligibility sections will have the capability to export in the following formats:
    - Excel
    - Word
    - PDF
- The pre-merged history will be displayed on the Eligibility History screen in chronological order of the merge transactions.

Feature Updates: Sprint 16

Client Search Client Name Enhancements

When an HRAR Admin or Data Manager User navigates to the 'Client Search' screen via the dashboard, the User will now be allowed to create clients with names less than 3 characters via the 'Create New Client' button.



Pre-Conditions:

- HRAR Admin and Data Managers will now be able to create clients with the below fields being less than 3 characters:
  - *This permission will be limited to control inaccurate/insufficient client data*
  - *The below fields will accept a minimum of 1 character and a maximum of 25 characters*
    - First Name
    - Last Name
    - Middle Name
    - Maiden Name

- When an HRAR Admin and Data Manager User attempts to enter a Middle Name with less than 3 characters, the following validation message will display, but will NOT prevent the User from proceeding with creating the client.
  - "Please verify that the Middle Name value is correct."

- HRAR Admin and Data Manager Users will be able to search clients with less than 3 characters via the 'Client Search' screen using an exact search logic.

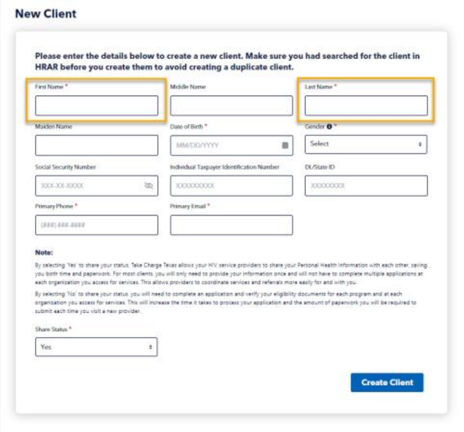
- HRAR Admin and Data Manager Users will be preventing from creating clients using any special characters or digits outside of the approved parameters.
  - The system will restrict the keyboard strokes when inputting any characters/digits outside of the approved list:
    - Dash
    - Apostrophe
    - Underscore

- This enhancement is applicable to the Agency Portal only.

Feature Updates: Sprint 16

Client Search Client Name Enhancements Cont.

When a Non-HRAR Admin or Non-Data Manager User navigates to the 'Client Search' screen via the dashboard, the User will NOT be allowed to create clients with First Name and/or Last Name fields being less than 3 characters.



<u>Pre-Conditions:</u>

- Non-HRAR Admin and Non-Data Managers will be prevented from creating clients with the below fields being less than 3 characters:
  - *This permission will be limited to control inaccurate/insufficient client data*
  - *The below fields will accept a minimum of 1 character and a maximum of 25 characters*
    - First Name
    - Last Name
- When a Non-HRAR Admin and Non-Data Manager User attempts to enter a Middle Name with less than 3 characters, the following validation message will display, but will NOT prevent the User from proceeding with creating the client.
  - "Please verify that the Middle Name value is correct."

- Non-HRAR Admin and Non-Data Manager Users will be able to search clients with less than 3 characters via the 'Client Search' screen using an exact search logic.

- Non-HRAR Admin and Non-Data Manager Users will be preventing from creating clients using any special characters or digits outside of the approved parameters.
  - The system will restrict the keyboard strokes when inputting any characters/digits outside of the approved list:
    - Dash
    - Apostrophe
    - Underscore

- This enhancement is applicable to the Agency Portal only.

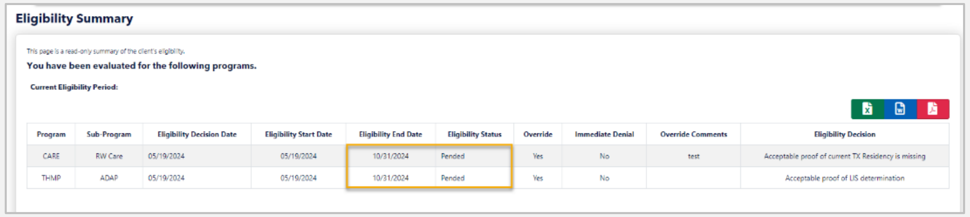
Feature Updates: Sprint 16

Task Board Task Board Pend Application Enhancement

When a TCT User processes eligibility for a THMP and/or CARE application and marks the application as ‘Pend’, the Task Board will retain the application’s previous THMP and/or CARE status for the THMP and/or CARE Status columns.

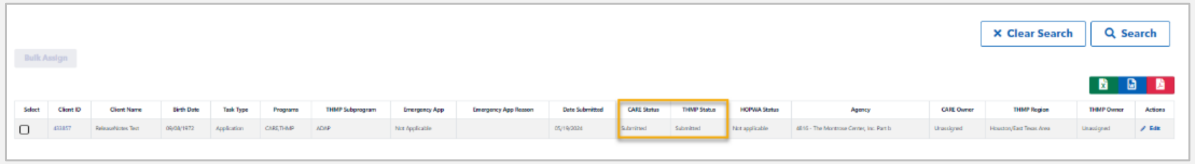
Pre-Conditions:

- User processes eligibility for a THMP and/or CARE application by marking the application as ‘Pend’.



- The Client Dashboard will then reflect the same ‘Pend’ status.

- The Task Board will then retain the application’s previous THMP and/or CARE status as the application is **not** considered ‘Complete’.
  - In this case, the THMP and CARE Status columns will reflect the previous ‘Submitted’ status on the Task Board.



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Feature Updates: Sprint 16

Pharmacy Pharmacy Update History

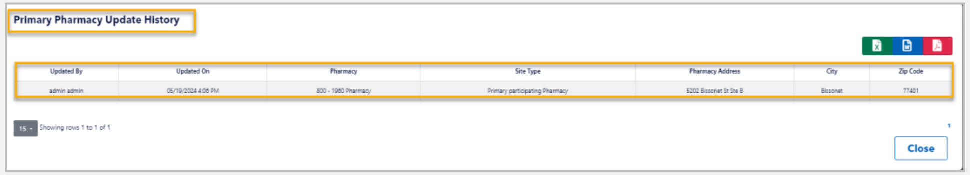
When a TCT User navigates to the Assign/Change Pharmacy screen within a Client's profile, two new history log buttons titled 'Primary Pharmacy Update History' and 'Secondary Pharmacy Update History' will appear beneath the Primary Pharmacy Search and Secondary Site Search sections, respectively.

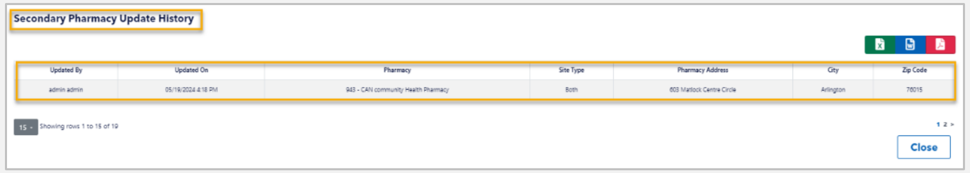
Pre-Conditions:

- Upon a TCT User updating a Primary and/or Secondary pharmacy via the Pharmacy Search screen, the pharmacy(ies) will populate on the 'Primary Pharmacy Update History' and/or 'Secondary Pharmacy Update History' pop ups, categorized by the below new columns:
    - Updated By
    - Updated On
    - Pharmacy
    - Site Type
    - Pharmacy Address
    - City
    - Zip Code
- The following column headers will be mapped to their corresponding fields via the Pharmacy Details screen:
    - Pharmacy Address
    - City
    - Zip Code
- 'Pharmacy' column header will include both the Pharmacy Code and Pharmacy Name.
- 'Site Type' column header will map to the pharmacy's 'Site Usage Designation' field in the Pharmacy Details screen.
    - This header will display Primary / Secondary / or Both pharmacy Site Type values

Things to Note:

- Both the Primary Pharmacy Update History and Secondary Pharmacy Update History results tables will be in descending order (latest pharmacy transaction update will appear on top).
- The Primary Pharmacy Update History and Secondary Pharmacy Update History pop up screens will have the following export capabilities: Excel, Word, PDF
- The data displayed on both the Primary Pharmacy Update History and Secondary Pharmacy Update History pop ups will be system generated and will not be editable.





Feature Updates: Sprint 16

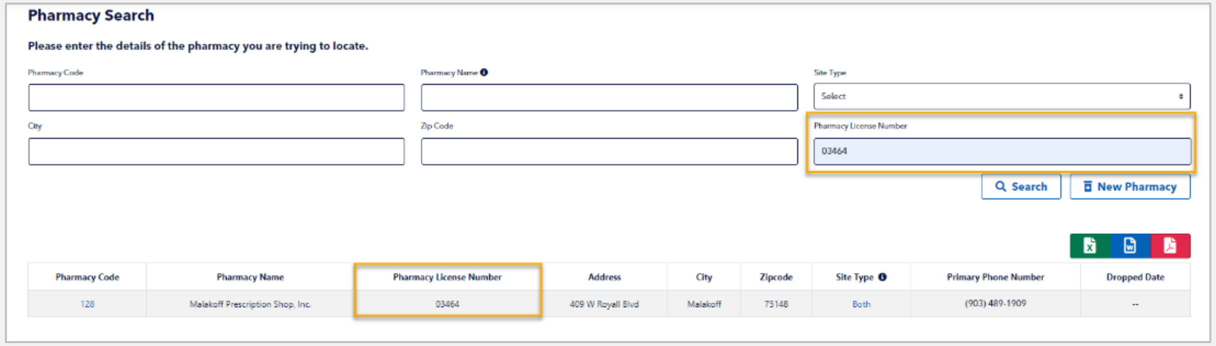
Pharmacy Pharmacy Search Enhancements

When a TCT Admin User (HRAR Admin, ADAP DataManAdmin, and/or ADAP Order Processor) searches for a pharmacy that is passed its Dropped Date, the User will be able to access the deactivated pharmacy via the Pharmacy Details screen to make any necessary updates. This same behavior will be restricted for Non-Admin user roles.

Pre-Conditions:

- Admin User (HRAR Admin, ADAP DataManAdmin, and/or ADAP Order Processor) lands on the 'Pharmacy Search' screen.
    - There will be a new, optional free text field titled 'Pharmacy License Number'.
        - This field will be an exact search match field.
        - This free text field will accept alpha-numeric values up to 25 characters.
        - This field will also be visible to Non-Admin user roles.

- Upon clicking 'Search', the Pharmacy License Number value entered by the Admin or Non-Admin user will display in the 'Pharmacy License Number' column in the results table on the Pharmacy Search screen.
    - If no pharmacy records populate in the Pharmacy License Number column, the license number is likely incorrect. The Admin or Non-Admin user can then use other search criteria fields on the Pharmacy Search screen to further narrow down the pharmacy search.



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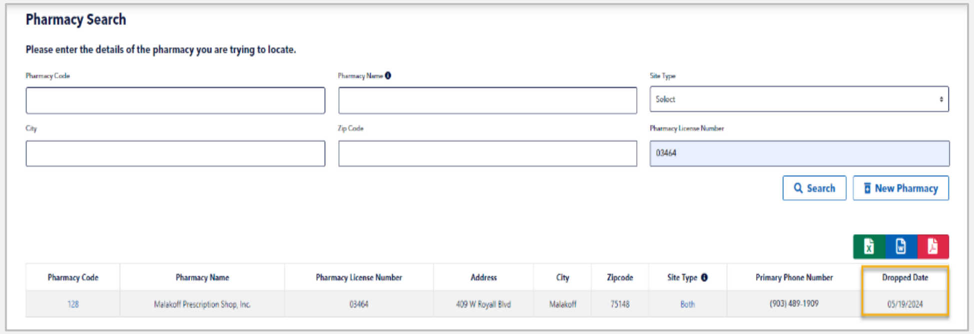
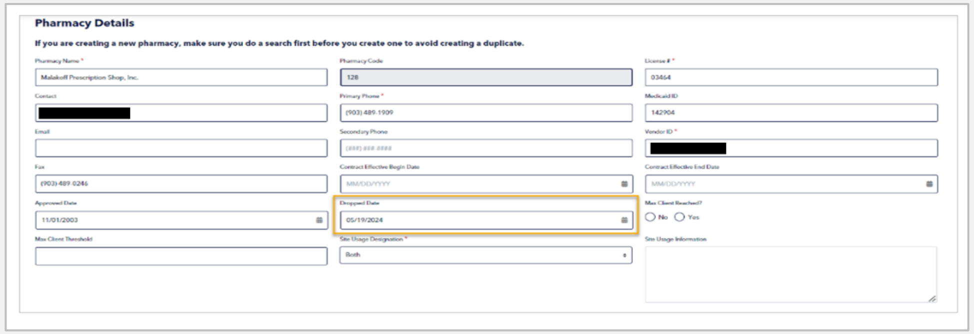
Feature Updates: Sprint 16

Pharmacy Pharmacy Search Enhancements Cont.

Pre-Conditions Cont.:

Only when an **HRAR Admin**, **ADAP DataManAdmin, and/or ADAP Order Processor** User searches by any of the Pharmacy Search criteria, will the User be able to access the Pharmacy Details screen via the Pharmacy Code hyperlink for the 'Dropped' pharmacy, meaning the pharmacy is deactivated.





- All other Non-Admin Users will be restricted from accessing the 'Dropped' pharmacy-specific information on the Pharmacy Details screen via the Pharmacy Code which will not be hyperlinked.
  - Non-Admin Users are still able to access the Pharmacy Code hyperlink if the Dropped Date is in the future and has not yet passed.

- The below new columns will be added to the Pharmacy Search results table:
  - Primary Phone Number
    - *This system generated value will be mapped to the 'Primary Number' field on the Pharmacy Details screen.*
  - Dropped Date
    - *This system generated value will be mapped to the 'Dropped Date' field on the Pharmacy Detail screen.*

- The below pre-existing columns will be removed from the Pharmacy Search results table:
  - Effective Begin Date
  - Effective End Date

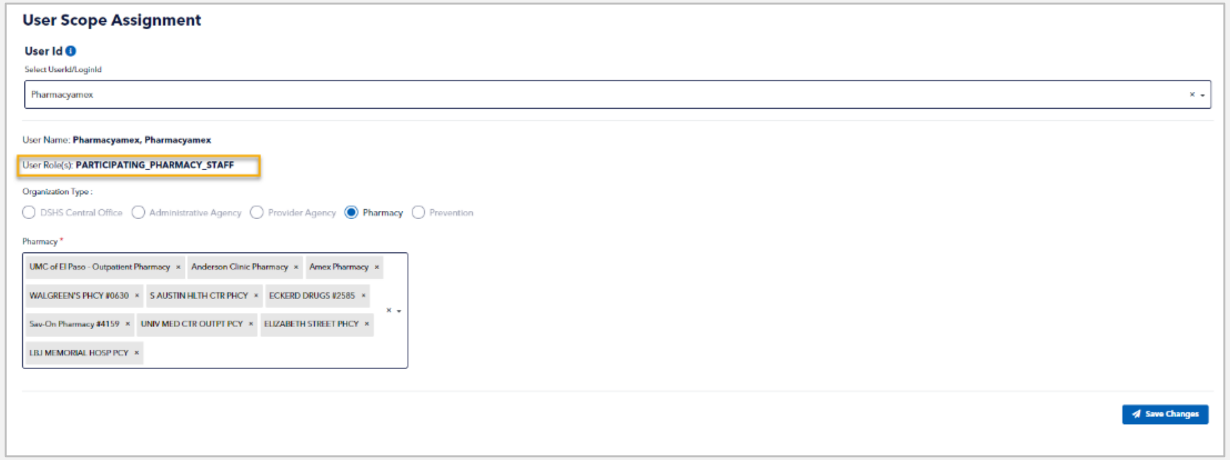
Feature Updates: Sprint 16

Pharmacy Multiple Pharmacies Associated to One User

When an HRAR Admin User navigates to the User Scope Assignment screen via the dashboard, they will now have the ability to add up to 10 pharmacies on behalf of a Pharmacy User, so the Pharmacy User may submit medication order(s) for multiple pharmacies.

Pre-Conditions:

- HRAR Admin must enter and select a UserID/LoginID for a Pharmacy User via the 'Select UserID/LoginID' drop down.
- Once a UserID/LoginID is selected, the User Scope Assignment screen will then populate with the pharmacy(ies) details for the Participating Pharmacy Staff user.
- The HRAR Admin can then proceed with adding up to 10 pharmacies on behalf of the Pharmacy User.
    - If the HRAR Admin attempts to add more than 10 pharmacies, an error message will display on screen and will not save the changes to the user's profile.
- HRAR Admins must save their changes for pharmacy assignments via the 'Save Changes' button.
- Pharmacy Users can then proceed with requesting/submitting medication order(s) via the Worker Portal Order screen.



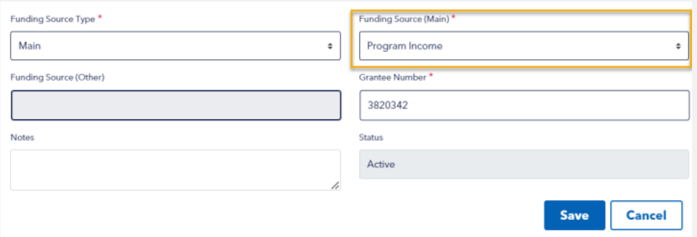
Feature Updates: Sprint 16

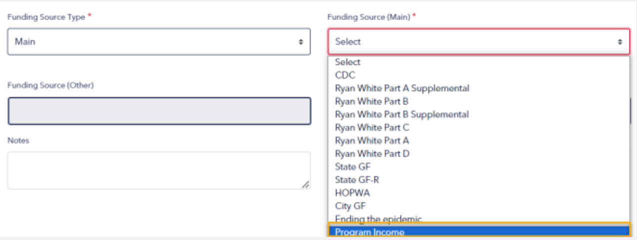
Contracts Contracts Drop Down List Enhancement

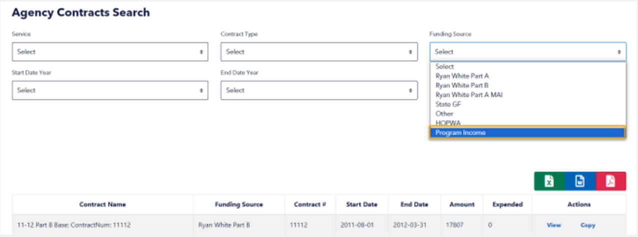
When a TCT User navigates to the Contracts tile via the dashboard, the User will now be able to add the ‘Program Income’ option as a Funding Source to the Agency and Agency Contracts.

<u>Pre-Conditions:</u>

- User lands on the Agency Search screen.
- User selects an agency via the Agency Search filters/search criteria.
- User clicks ‘Search’ and navigates into the specified ‘Agency ID’ hyperlink.
- User then clicks on the ‘View/Add Funding Source’ button on the Agency Information screen.
- User clicks on the ‘Add Funding Source’ button.
- User must then select the ‘Main’ option under the required ‘Funding Source Type’ drop down.
- User will then select the ‘Program Income’ option under the required ‘Funding Source (Main)’ drop down.
    - *This is a conditional, mandatory field which is dependent on selecting the ‘Main’ funding source type*
- User must then enter digits in the required ‘Grantee Number’ free text field.
    - *Free text field accepts numeric characters only*
- Upon successfully adding the ‘Program Income’ funding source to the agency, the ‘Program Income’ option will then appear in the Funding Sources results table.
- Once complete, the User can then manually assign the ‘Program Income’ funding source to Agency Contract(s) via the ‘View/Add Contracts’ button on the Agency Information screen.





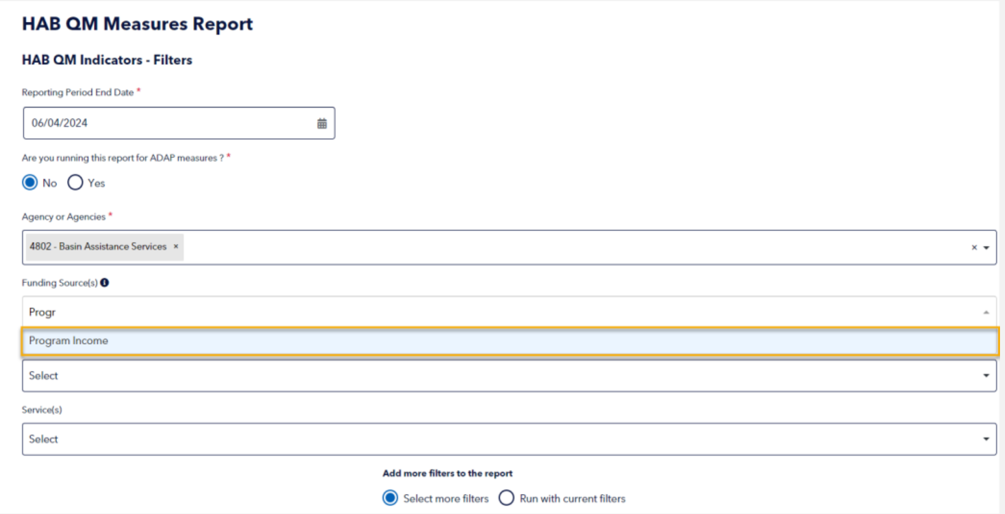


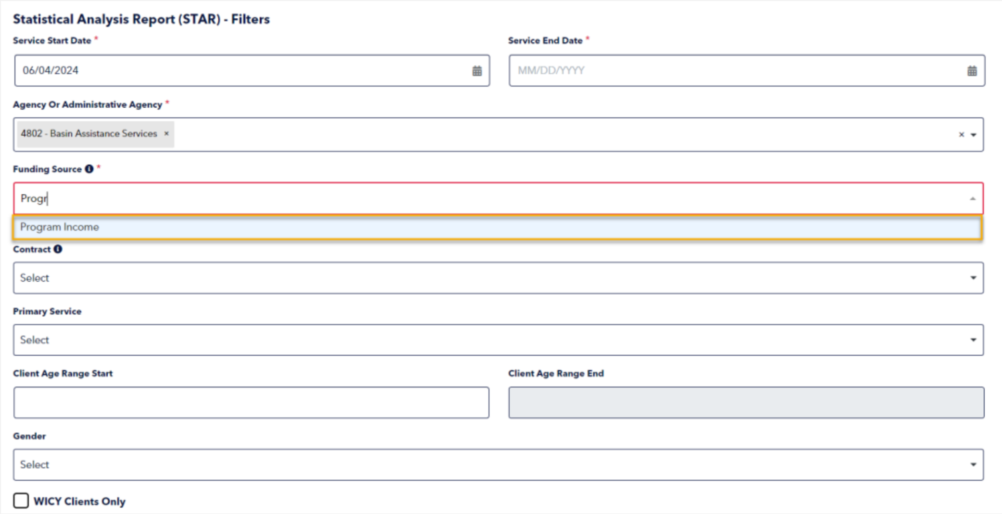
Feature Updates: Sprint 16

Contracts Contracts Drop Down List Enhancement Cont.

Pre-Conditions Cont.:

- Once the User has manually assigned the 'Program Income' funding source to the Agency and Agency Contract(s), the HAB and STAR Reports will then display the 'Program Income' funding source option via the 'Funding Source' drop downs.





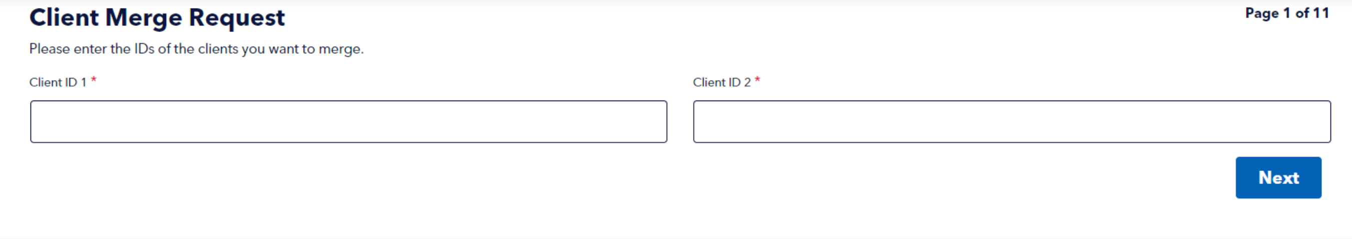
Feature Updates: Sprint 16

Merge Client Merge Enhancement

When a pre-merged client is merged in the TCT system, the below logic will occur for the newly merged Client ID based on the below scenarios.

Pre-Conditions:

- Upon submitted a Client Merge either via the Automated or Manual Merge processes, the following enhancements will occur:
    - When Pre-Merged Client ID 1 is in ‘Approved’ status and Pre-Merged Client ID 2 is in ‘Pending’ status (because the application has not yet been processed), then the merge between the two Parent Client IDs will retain the ‘Approved’ status for the newly merged Client ID.
    - When a Pre-Merged Client ID 1 is in ‘Rejected’ status and Pre-Merged Client ID 2 is in ‘Pending’ status (because the application has not yet been processed), then the merge between the two Parent Client IDs will retain the ‘Rejected’ status for the newly merged Client ID.
    - When a Pre-Merged Client ID 1 is in ‘Denied’ status and Pre-Merged Client ID 2 is in ‘Pending’ status (because the application has not yet been processed), then the merge between the two Parent Client IDs will retain the ‘Denied’ status for the newly merged Client ID.
    - When a Pre-Merged Client ID 1 is in ‘Pend’ status (because the application was marked as ‘Pend’) and Pre-Merged Client ID 2 is in ‘Pending’ status (because the application has not yet been processed), then the merge between the two Parent Client IDs will retain the ‘Pend’ status for the newly merged Client ID.



Feature Updates: Sprint 16

Interfaces Create Client Import Process Enhancement

When a TCT User attempts to Create a Client using less than 3 characters for the First Name, Last Name, and/or Maiden Name fields via the Create Client Import Batch File process, the below error message will display, which can be found under the 'Error' folder.

Pre-Conditions:

- User submits a Create Client Import request(s) using less than 3 characters for the following fields:
  - First Name
  - Last Name
  - Maiden Name

- The below error message will now display for the identified error(s) per the enhancement requirements.
  - This will NOT create the new client in the TCT system as it does not meet the necessary requirements.
  - The error message(s) will identify which of the above field(s) contain the error.

- If multiple client requests are included in the same Import Batch File and meet the First Name, Last Name, and Maiden Name length requirements (are no less than 3 characters), no error message(s) will display on screen and the newly created clients will obtain Client IDs.

- If the User needs to proceed with creating a client with less than 3 characters for First Name, Last Name, and Maiden Name fields, the User should contact their respective Data Manager as this enhancement is in place to prevent insufficient client data.

Feature Updates: Sprint 16

Agency Portal Client Pages Exposed Infant Enhancements

When a TCT User navigates to the 'My Health' section of a Client Application or the 'Basic Medical Information' section of a Client Dashboard in the Agency Portal, the User will now be able to view and select the 'Perinatal HIV Exposure' diagnosis option found under the 'Chronic Medical Conditions' sub section.

Pre-Conditions:

- Agency and Client Portals
  - In the Application Workflow of the Agency and Client Portals, when a User lands on the 'My Health' section, the User will now be able to select the 'Perinatal HIV Exposure' diagnosis check box found under the multi-select Chronic Medical Conditions sub section.

- Agency Portal
  - In the Agency Portal, the User can now navigate to the 'HIV Diagnosis Details' screen via the Client Dashboard to update the Perinatal Exposure diagnosis details via the 'Add HIV Diagnosis Detail Record' pop up.
    - Users can change the Perinatal Exposure diagnosis details by updating the required 'HIV Diagnosis' single-select drop down and selecting the 'Perinatal Exposed Confirmed Negative' picklist value.
      - *This option should only be selected after extensive infant testing confirming the infant is not living with HIV and can be discharged.*

  - In the Agency Portal, on the 'View STAR Report' screen, under the 'HIV Status' column, the 'Perinatal Exposure Confirmed Negative' selection will then populate, as applicable to the search criteria, to display the results of the associated number of Clients and percent of Total Values confirmed for the diagnosis.

- Client Portal
  - The Application Workflow in the Client Portal will provide Spanish text translation for the 'Perinatal HIV Exposure' option added to the multi-select Chronic Medical Conditions sub section.
    - Exposición perinatal al VIH

- This enhancement feature is applicable to both the Agency and Client Portals, respectively, and is applicable to the following Application Types:
  - New Application
  - Recertification
  - Self-Attestation
  - Change Request
  - Referral

Feature Updates: Sprint 16

Agency Portal Client Pages Exposed Infant Enhancements Cont.

Agency & Client Portals

Chronic Medical Conditions *

- [ ] Alcohol abuse
- [ ] Alzheimer's Disease and Related Dementia
- [ ] Arthritis (Osteoarthritis and Rheumatoid)
- [ ] Asthma
- [ ] Atrial Fibrillation
- [ ] Autism Spectrum Disorders
- [ ] Cancer (Breast, Colorectal, Lung, and Prostate)
- [ ] Chronic Kidney Disease
- [ ] Chronic Obstructive Pulmonary Disease
- [ ] Depression
- [ ] Diabetes
- [ ] Drug Abuse/ Substance Abuse
- [ ] HIV/AIDS
- [ ] Heart Failure
- [ ] Hepatitis (Chronic Viral B & C)
- [ ] Hyperlipidemia (High cholesterol)
- [ ] Hypertension (High blood pressure)
- [ ] Ischemic Heart Disease
- [ ] Osteoporosis
- [ ] Other
- [x] Perinatal HIV Exposure
- [ ] Schizophrenia and Other Psychotic Disorders
- [ ] Stroke

Agency Portal

Add HIV Diagnosis Detail Record

HIV Diagnosis *

Pediatric indeterminate

- Select
- HIV Positive
- HIV negative (affected)
- HIV positive, disease status unknown
- Indeterminate (adult)
- Pediatric indeterminate
- Perinatal Exposed Confirmed Negative

Select

HIV Diagnosis Date *

MM/DD/YYYY

HIV Test Location County

Select

Have you had post test counselling

Select

Add Record | Cancel

HIV Status	Number of Clients	% of Total
HIV negative (affected)	0	0.00%
HIV positive, disease status unknown	0	0.00%
HIV Positive	1	100.00%
Indeterminate (adult)	0	0.00%
Pediatric indeterminate	0	0.00%
Perinatal Exposed Confirmed Negative	1	100.00%

Client Portal

Afecciones médicas crónicas *

- [ ] Abuso de alcohol
- [ ] Abuso de drogas/de sustancias
- [ ] Accidente cerebrovascular
- [ ] Artritis (osteoartritis y reumatoide)
- [ ] Asma
- [ ] Cardiopatía isquémica
- [ ] Cáncer (de mama, de colon y recto, de pulmón y de próstata)
- [ ] Depresión
- [ ] Diabetes
- [ ] Enfermedad de Alzheimer y demencia relacionada
- [ ] Enfermedad pulmonar obstructiva crónica
- [ ] Enfermedad renal crónica
- [ ] Esquizofrenia y otros trastornos psicóticos
- [ ] Exposición perinatal al VIH
- [ ] Fibrilación auricular
- [ ] Hepatitis (virales crónicas B y C)
- [ ] Hiperlipidemia (colesterol alto)
- [ ] Hipertensión (presión arterial alta)
- [ ] Insuficiencia cardiaca
- [ ] Osteoporosis
- [ ] Otro
- [ ] Trastornos del espectro autista
- [ ] VIH/SIDA

Feature Updates: Sprint 16

Agency Portal Client Pages Income & Tax Enhancements

When a TCT User navigates to the 'My Income' section of a Client Application or the 'Income and Tax' section of a Client Dashboard in the Agency Portal, the User will now be able to view and select additional Income and Tax fields if the Client applying for services is under 18 years of age.

Pre-Conditions:

- Agency and Client Portals
  - In the Application Workflow of the Agency and Client Portals, when a User lands on the Income and Tax section, the User will be able to view and select the below mandatory Income and Tax questions if the Client is under 18 years of age.
    - Do you own a house?
    - Do you own a car?
    - Dollar amount of other assets?
    - Does anyone else help towards the Client's monthly expenses like rent and utilities? (Partner/Spouse, Roommate, **Parent Guardian**)
    - How much do they contribute?
    - How does the Client file their taxes?
      - *Question is applicable to the Agency Portal only and is not part of the Application Workflow*
  - This age logic will be mapped to the Date of Birth attribute captured in the 'About You' section of a Client Application.
  - If a mandatory field is left blank, the field(s) will indicate an error message on screen reading "This field is required".
  - If the Client is over 18 years of age, these new Income and Tax fields will be left optional as the Client is not identified as a dependent.

- Agency Portal
  - In the Agency Portal, the User can navigate to the Client's Dashboard and click on the 'Income and Tax' section to edit/change any information captured for the dependent.

- This enhancement is applicable to both the Agency and Client Portals, respectively, and is applicable to the following Application Types:
  - New Application
  - Recertification
  - Self-Attestation
  - Change Request
  - Referral

Feature Updates: Sprint 16

Agency Portal Client Pages Income & Tax Enhancements Cont.

Agency & Client Portals

Assets & Expenses

Note: All fields marked * are required. If you need assistance, please use the Help button above.

Do you own a house? *

Yes | **No** | N/A

Do you own a car? *

Yes | No | N/A

Dollar amount of other assets *

$ 0

Does anyone else help towards your monthly expenses like rent and utilities? (Partner/Spouse, Roommate, Parent/Guardian) *

Yes | No | N/A

How much do they contribute? *

$ 250

Back

Agency Portal

Client Tax Information

How does the Client file their taxes? *

Select

- Select
- I am a dependent on my parents/guardians
- I did not file taxes
- Individual Tax Return

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Feature Updates: Sprint 16

Agency Portal Client Pages HIV/AIDS Test Location Site Enhancements

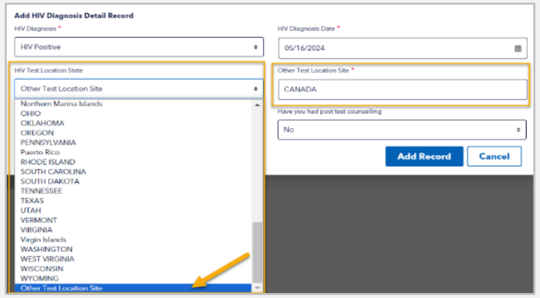
When a TCT User navigates to the 'HIV Diagnosis Details' screen within a Client's profile by clicking on the 'Medical' drop down on the left-hand panel, the User will now see the added picklist value titled 'Other Test Location Site' in the 'HIV Test Location State' field on the 'Add HIV Diagnosis Detail Record' pop up.

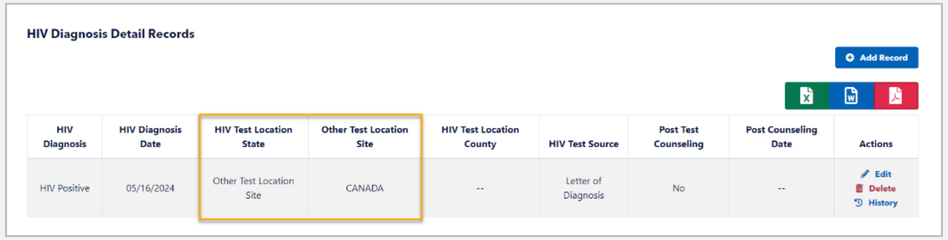
Pre-Conditions:

- Upon clicking on the 'Add Record' button on the HIV Diagnosis Details screen, the User is routed to the 'Add HIV Diagnosis Detail Record' pop up. If the Client had their HIV testing conducted outside of the United States, the User can select the 'Other Test Location Site' option in the 'HIV Test Location State' drop down.
    - All mandatory search criteria fields must be entered on the 'Add HIV Diagnosis Detail Record pop up' in order to save the HIV record(s).

- After the User selects the 'Other Test Location Site' option in the 'HIV Test Location State' field, a new required free text field will display on screen titled 'Other Test Location Site', for the User to indicate the test location site outside of the United States.
    - Free text field is limited to 100-characters.
    - If the User fails to enter a Country/Region in the free text field, an error message will display on screen stating the following: "This field is required."

- Once the User has successfully added a new HIV record or edited an existing HIV record via the 'Add HIV Diagnosis Detail Record' pop up, the record(s) will then populate in the results table of the 'HIV Diagnosis Details' screen indicating the values the User selected and entered in the Outside Test Location Site fields.
    - The results table will then include the below new columns:
        - HIV Test Location State
            - This column will indicate the 'Other Test Location State' option if selected by the user.
        - Other Test Location Site
            - This column will indicate the test location site entered by the User in the 'Other Test Location Site' field (i.e., Canada)





Feature Updates: Sprint 16

Agency Portal Client Pages HIV/AIDS Test Location Site Enhancements Cont.

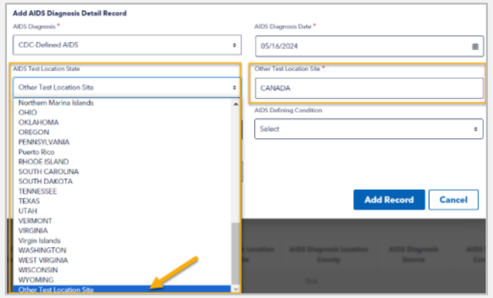
When a TCT User navigates to the 'AIDS Diagnosis Details' screen within a Client's profile by clicking on the 'Medical' drop down on the left-hand panel, the User will now see the added picklist value titled 'Other Test Location Site' in the 'AIDS Test Location State' field on the 'Add AIDS Diagnosis Detail Record' pop up.

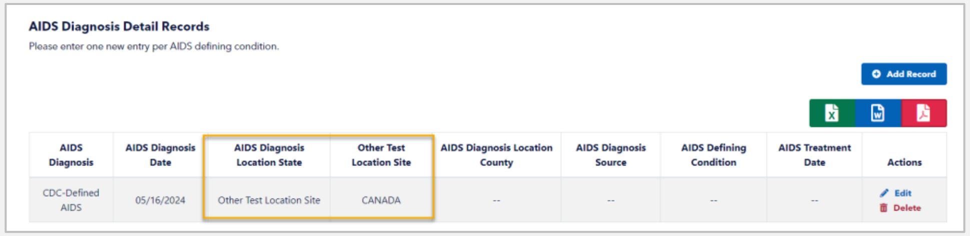
<u>Pre-Conditions:</u>

- Upon clicking on the 'Add Record' button on the AIDS Diagnosis Details screen, the User is routed to the 'Add AIDS Diagnosis Detail Record' pop up. If the Client had their AIDS testing conducted outside of the United States, the User can select the 'Other Test Location Site' option in the 'AIDS Test Location State' drop down.
    - All mandatory search criteria fields must be entered on the 'Add AIDS Diagnosis Detail Record' pop up in order to save the AIDS record(s).

- After the User selects the 'Other Test Location Site' option in the 'AIDS Test Location State' field, a new required free text field will display on screen titled 'Other Test Location Site', for the User to indicate the test location site outside of the United States.
    - Free text field is limited to 100-characters.
    - If the User fails to enter a Country/Region in the free text field, an error message will display on screen stating the following: "This field is required."

- Once the User has successfully added a new AIDS record or edited an existing AIDS record via the 'Add AIDS Diagnosis Detail Record' pop up, the record(s) will then populate in the results table of the 'AIDS Diagnosis Details' screen indicating the values the User selected and entered in the Outside Test Location Site fields.
    - The results table will then include the below new columns:
        - AIDS Test Location State
            - This column will indicate the 'Other Test Location State' option if selected by the user.
        - Other Test Location Site
            - This column will indicate the test location site entered by the User in the 'Other Test Location Site' field (i.e., Canada)





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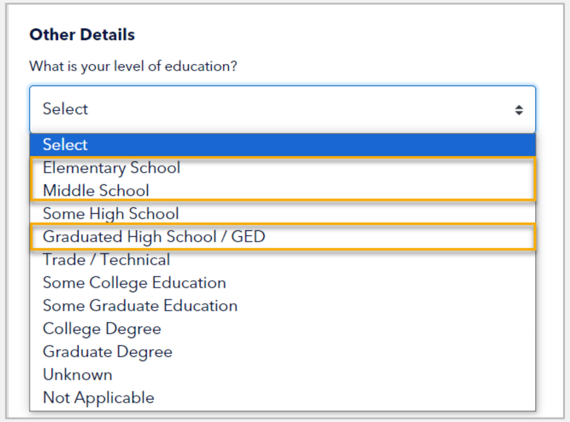
Feature Updates: Sprint 16

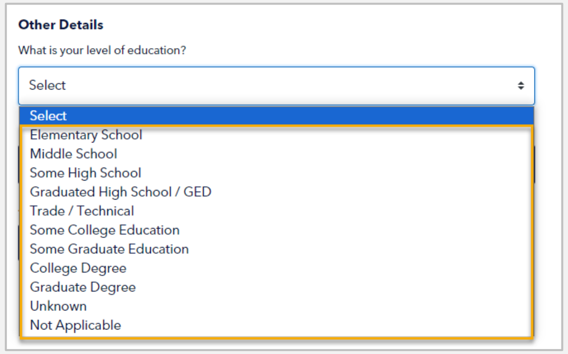
Agency Portal Client Pages Level of Enhancements

When a TCT User navigates to the ‘About Me’ section of a Client Application or the ‘About You’ section of a Client Dashboard in the Agency Portal, the User will now be able to view and select additional Level of Education picklist values for the ‘What is your level of education?’ question drop down in both the Agency and Client Portals.

Pre-Conditions:

- Agency and Client Portals
  - In the Agency and Client Portals, when initiating a Client Application and landing on the ‘About Me’ section, the User will see the below picklist values added to the ‘What is your level of education?’ optional, single-select question drop down.
    - Elementary School
    - Middle School
    - Graduated High School / GED
  - In the Agency and Client Portals, the below pre-existing Level of Education picklist values will be removed from the ‘What is your level of education?’ optional, single-select question drop down.
    - High School Diploma / GED
    - No High School
  - In both the Agency and Client Portals, the new order that will display for the Level of Education picklist values for the optional, single-select ‘What is your level of education?’ question drop down is below (reading top to bottom).
    - Elementary School
    - Middle School
    - Some High School
    - Graduated High School / GED
    - Trade / Technical
    - Some College Education
    - Some Graduate Education
    - College Degree
    - Graduate Degree
    - Unknown
    - Not Applicable





Feature Updates: Sprint 16

Agency Portal Client Pages Level of Enhancements Cont.

Pre-Conditions:

- Agency Portal
  - In the Agency Portal, when navigating to the Client Dashboard and landing on the 'About You' section under the 'Case' tab, the User will see the below picklist values added to the "What is your level of education?" optional, single-select question drop down.
    - Elementary School
    - Middle School
    - Graduated High School / GED
- Client Portal
  - The Client Portal will provide Spanish text translations for the 3 added Level of Education fields for the 'What is your level of education?' optional, single-select question drop down on the application workflow.
    - Escuela Primaria
    - Escuela Intermedia
    - Graduado de la Preparatoria / GED
- This enhancement is applicable to both the Agency and Client Portals, respectively, and is applicable to the following Application Types:
  - New Application
  - Recertification
  - Self-Attestation
  - Change Request
  - Referral