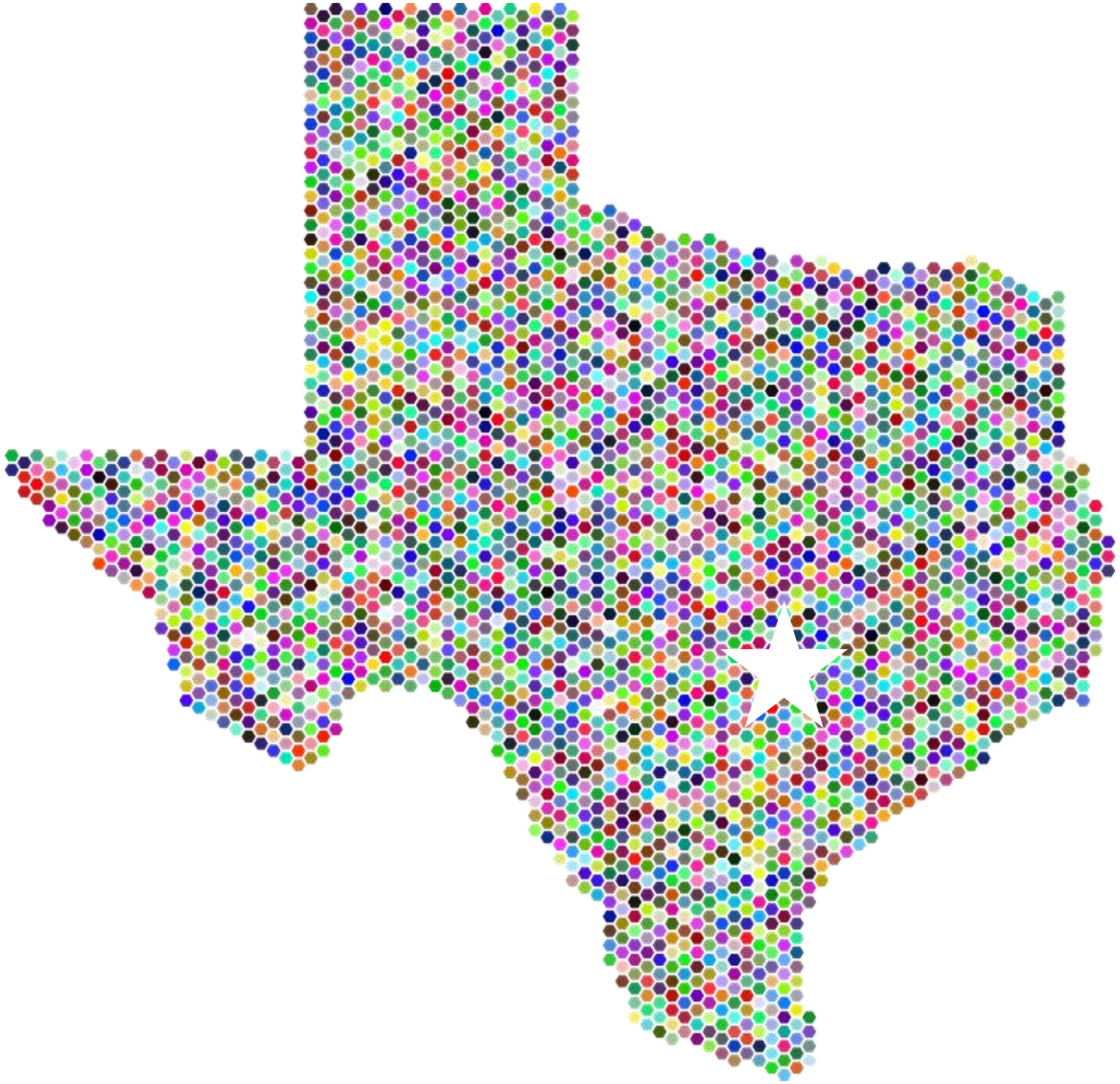
Take Charge Texas (TCT) User Engagement Session

July 2nd, 2024



Meet the Facilitators

DSHS/HHSC TEAM

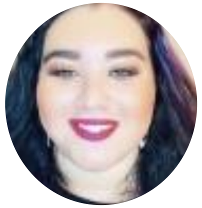
Charletha Joseph
Program Support

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
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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.

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: Successfully Completed Features

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

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.

Sprint 17

Focused on enhancing the Pharmacy Portal to trigger in portal notifications for unassigned Primary Pharmacies and deactivated Primary and/or Secondary Pharmacies. Improved the Ad Hoc and HAB report outputs to include additional data element features. Introduced the Medicaid Match and Clients with Medicare Insurance Reports and created the Verification Checklist repository.

User Stories

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

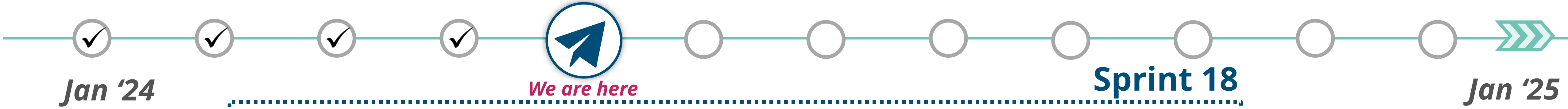
Sprint 17

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

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 18.



Focusing on informing Users when a Primary Pharmacy is not assigned to a Client's profile and/or when a Primary/Secondary Pharmacy is deactivated, so appropriate action can be taken via the Pharmacy Portal. Enhancing the Pharmacy Banner, Task Board, WICY Report, and STAR Report, so Users can take applicable actions. Introducing the Verification Checklist repository and new screen to efficiently track the imports across Create Client, Update Client, Medical and Services. Enabling the activation of inactive Clients by HRAR Admins, so Clients can be activated within the System, as needed.

- STAR Report: Funding Source Enhancement
- WICY Report: Addition of EHE as a Funding Source
- Pap Smear Test Result Enhancement
- Failed Orders Email Recipient Enhancement
- Update Client Information via Create Client Import Process
- Improving Batch Imports Error File Tracking – Medical, Services, Update Client and Create Client
- Add Pharmacy Code Search Field to User Scope Assignment Screen
- Adding ART Drugs to HIV Medication Information Screen
- Reactivating Inactive Clients Enhancement
- Worker Portal Order Screen Enhancement
- Submitting Order Conflict Enhancements
- Eligibility History Details Enhancement
- Addition of Updates to Change Reports & Self Attestations on Task Board
- Active User and Role Report Enhancements
- Drug Regimen Notes

System Overview: New TCT Features

Live Demonstration of TCT Features

TCT Features Video Presentation

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

Poll Everywhere

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If you are **not** a DSHS Staff member (agency workers, etc.), please use this link:
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How beneficial are the upcoming TCT System enhancements for your role? Please click on the applicable rank to submit your answer.

Gathering Your Feedback

Poll Everywhere

Poll Everywhere

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

How to Provide Feedback to TCT?

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

Our team always welcomes your feedback! Please feel free to reach out to **Charletha Joseph** at **Charletha.Joseph@dshs.texas.gov**.

Reasons to Provide Feedback

- TCT System will include enhancements that cater to your responsibilities!
- Your Clients will benefit with the Enhancements and Maintenance of the System!

Next Steps

Upcoming Activities

Please reach out Charletha for any questions related to this presentation.

Charletha Joseph

Charletha.Joseph@dshs.texas.gov

Our team will **share this presentation** with this group following this session.

Thank You!

System Overview: New TCT Features

Feature Updates: Sprint 17

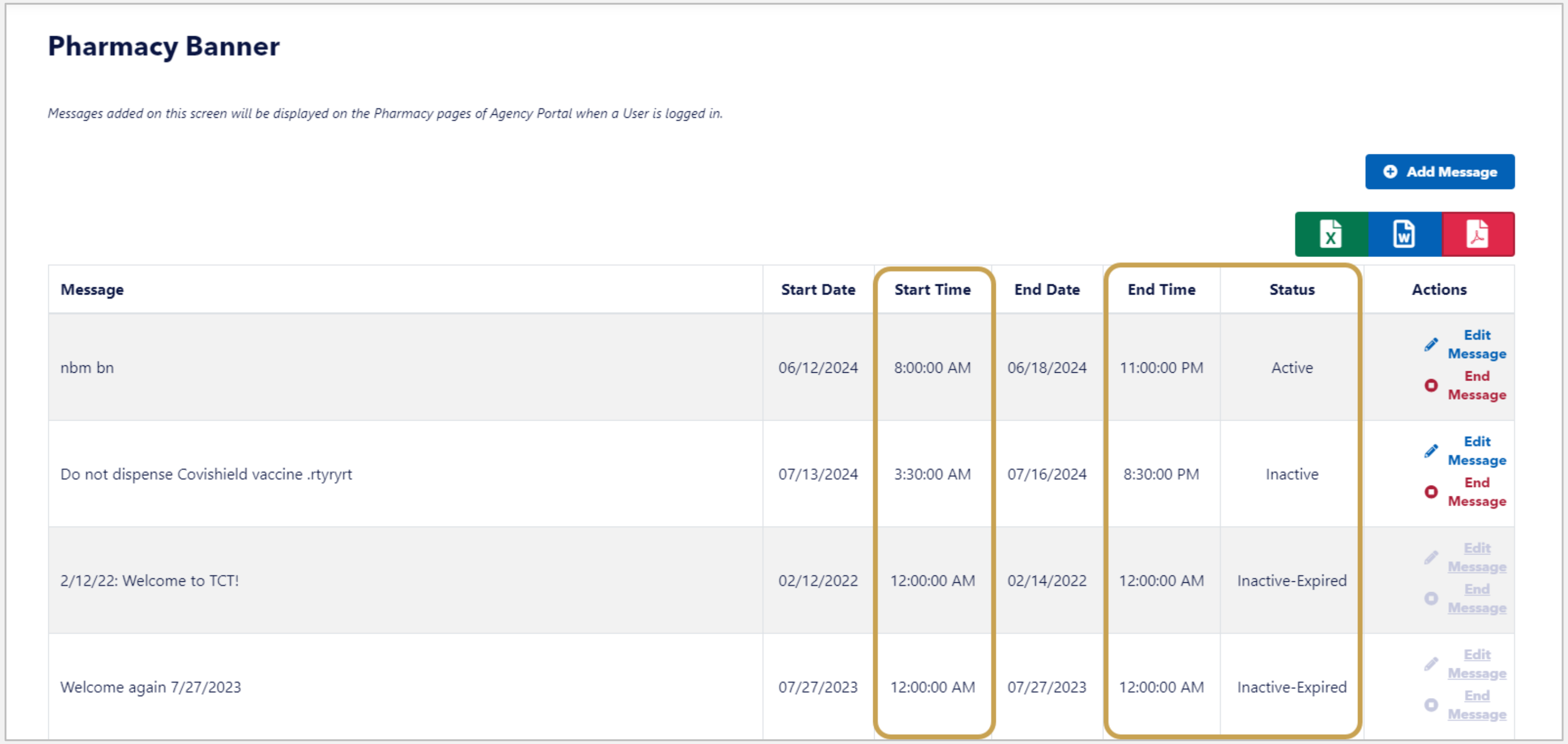
Pharmacy Pharmacy Banner Enhancements

When a TCT User navigates to the Pharmacy Banner via the 'Admin' tile by clicking on the 'TCT Banners' drop down, the following enhancements will occur:

- The Pharmacy Banner's results table will display the below new columns:
    - Start Time
        - This will be a mandatory picklist drop down of all times between 12 AM to 11:59 PM in increments of 30 minutes.
        - The values for the 'Start Time' column will be sourced from the value selected for the 'Start Time' single-select drop down In the 'Add Message' pop up.
    - End Time
        - This will be a mandatory picklist drop down of all times between 12 AM to 11:59 PM in increments of 30 minutes.
        - The values for the 'End Time' column will be sourced from the value selected for the 'End Time' single-select drop down in the 'Add Message' pop up.
    - Status
        - The values for the 'Status' column will be system generated based on the values selected for both the 'Start Time' and 'End Time' single-select drop downs in the 'Add Message' pop up.
        - The below system generated values will display for the 'Status' column:
            - Active
                - If the banner message is active per the specifications indicated in the 'Add Message' pop up (dependent upon the 'Start Time', 'End Time', and 'End Date' values).
                    - Active banner message(s) will appear at the top of the results table.
            - Inactive
                - If the future banner message is <u>not</u> yet active per the specifications indicated in the 'Add Message' pop up (dependent upon the 'Start Time', 'End Time', and 'End Date' values).
                    - Inactive banner message(s) will appear in the middle of the results table.
            - Inactive – Expired
                - If the past banner message(s) have ended meaning the duration period specified in the 'Add Message' pop up is over (dependent upon the 'Start Time', 'End Time', and 'End Date' values).
                    - Inactive – Expired banner message(s) will appear towards the bottom of the results table.

Feature Updates: Sprint 17

Pharmacy Pharmacy Banner Enhancements Cont.



Pharmacy Banner

Messages added on this screen will be displayed on the Pharmacy pages of Agency Portal when a User is logged in.

Add Message

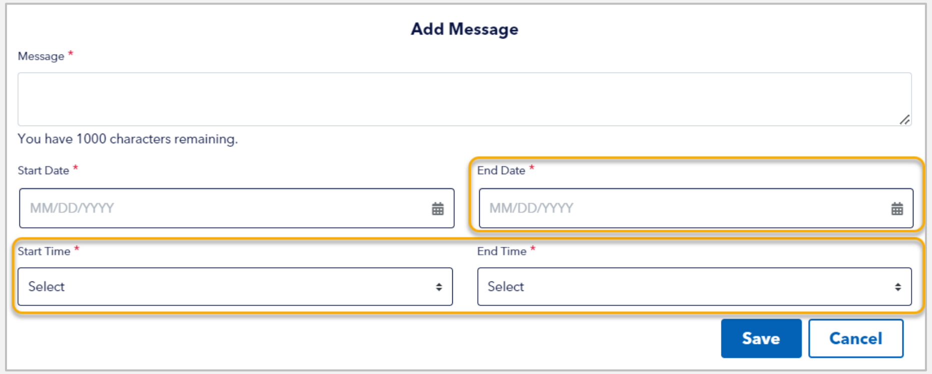
Message	Start Date	Start Time	End Date	End Time	Status	Actions
nbm bn	06/12/2024	8:00:00 AM	06/18/2024	11:00:00 PM	Active	Edit Message End Message
Do not dispense Covishield vaccine .rtyryrt	07/13/2024	3:30:00 AM	07/16/2024	8:30:00 PM	Inactive	Edit Message End Message
2/12/22: Welcome to TCT!	02/12/2022	12:00:00 AM	02/14/2022	12:00:00 AM	Inactive-Expired	Edit Message End Message
Welcome again 7/27/2023	07/27/2023	12:00:00 AM	07/27/2023	12:00:00 AM	Inactive-Expired	Edit Message End Message

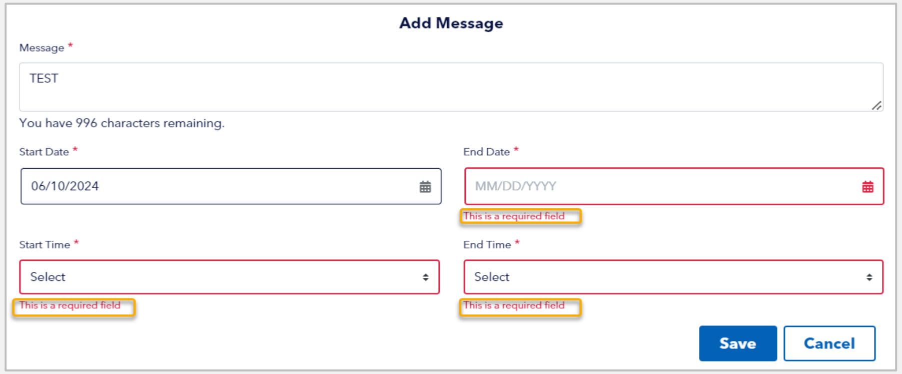
Feature Updates: Sprint 17

Pharmacy Pharmacy Banner Enhancements Cont.

- The Pharmacy Banner's 'Add Message' pop up will now include the below mandatory fields:
    - Start Time
        - This will be a mandatory picklist drop down of all times between 12 AM to 11:59 PM in increments of 30 minutes.
        - There will be a validation in place which will prevent Users from selecting a Start Date which is prior to the current date.
    - End Time
        - This will be a mandatory picklist drop down of all times between 12 AM to 11:59 PM in increments of 30 minutes.
        - There will be a validation in place which will prevent Users from selecting an End Time which is prior to the Start Time if the Start Date and End Date are the same.
    - End Date
        - This will be a calendar field.
        - Users will have the ability to select a future date.
        - There will be a validation in place which will prevent Users from selecting an End Date which is prior to the Start Date.

- If the User fails to enter the above mandatory fields via the 'Add Message' pop up, the following message will display on screen:
    - "This is a required field"



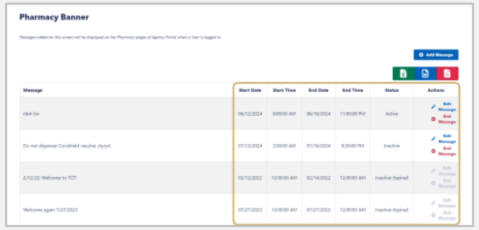


Feature Updates: Sprint 17

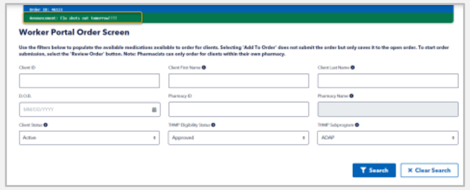
Pharmacy Pharmacy Banner Enhancements Cont.

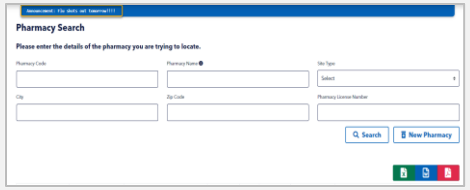
- The 'End Banner' action button on the Pharmacy Banner will update to 'End Message'.
- A new action button will appear on the Pharmacy Banner titled 'Edit Message', which will display the 'Add Message' pop up for the User to edit a banner message once activated.
  - *An exception to the 'Edit Message' action would be if the User clicks on the 'End Message' action before the banner message's duration period ends.*
    - *The 'Edit Message' action will <u>not</u> be visible/clickable to banner messages that are inactive/inactive-expired.*

- The Pharmacy Banner's columns will be re-structured to the following order on the results table (reading left to right).
  - *This enhancement is also applicable to the Agency and Client Portal Banners.*
    - Start Date
    - Start Time
    - End Date
    - End Time
    - Status
    - Actions



- Any active banner message added via the Pharmacy Banner will now display on the Worker Portal Order and Pharmacy Search screens.
  - *This message is currently visible only on the Orders screen.*
  - *Only Pharmacy Users who have access to the Orders, Worker Portal Order, and Pharmacy Search screens will be able to view the active banner messages.*





- The Pharmacy Banner screen will now include the below Help Text beneath the title:
  - "Messages added on this screen will be displayed on the Pharmacy pages of Agency Portal when a user is logged in."

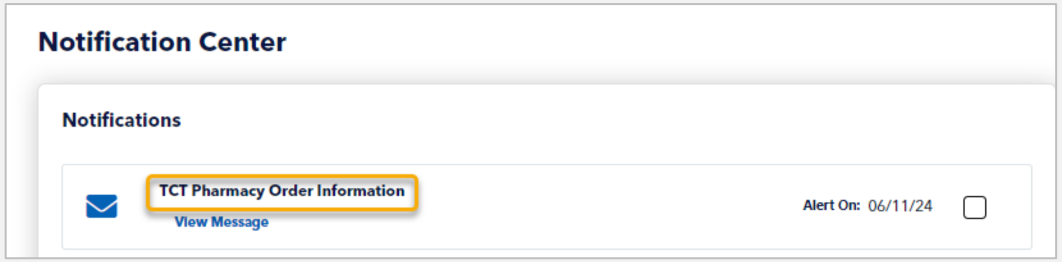
- Only Users that have Read/Write permissions will be able to add and edit banner messages via the Pharmacy Banner.
  - All other Users will have Read Only access.

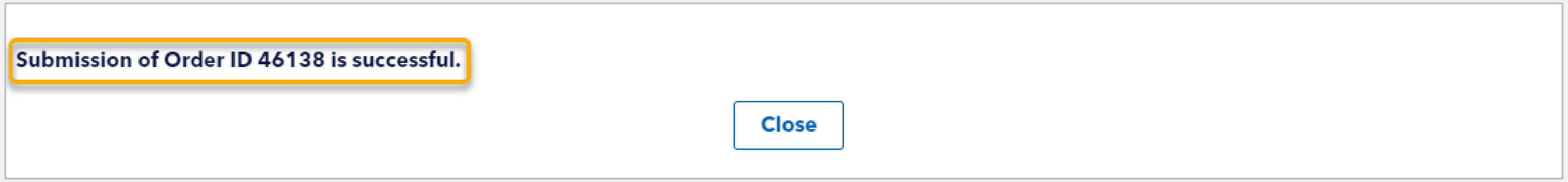
Feature Updates: Sprint 17

Pharmacy Notification for Pharmacy Orders & Order Override Submissions

When a TCT User navigates to the Worker Portal Order screen to submit medication order(s), for medications requiring and not requiring override, the following enhancements will occur:

- After clicking on the 'Submit to Warehouse' button, on the Review Order screen, the User will then receive both in-portal and email notifications informing them of the action.
    - In-portal notifications can be found via the Notification Center.
        - Subject: TCT Pharmacy Order Information
        - View Message: "Submission of Order ID ##### is successful."
            - '#####' represents the system generated Order ID.
            - This pop up will also include a 'Close' button that the User must click on to close out the in-portal notification.

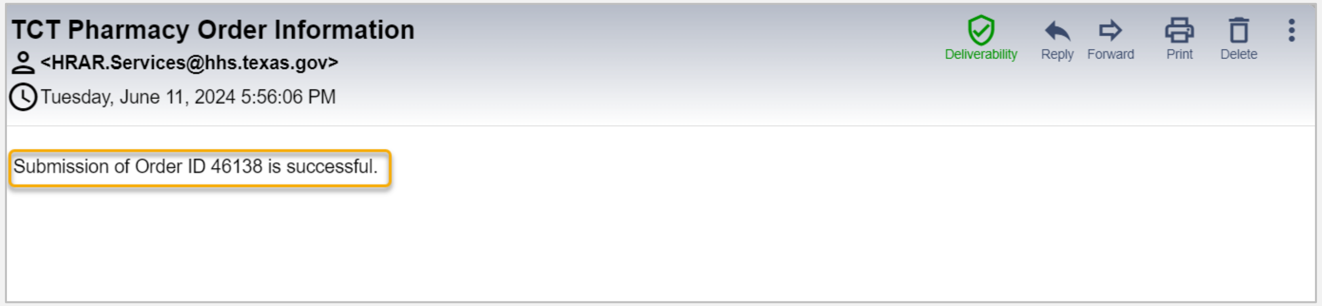




Feature Updates: Sprint 17

Pharmacy Notification for Pharmacy Orders & Order Override Submissions Cont.

- Email notifications can be found via the email address captured in the Client's profile.
    - Subject: TCT Pharmacy Order Information
    - Email Message: "Submission of Order ID ##### is successful."
        - '#####' represents the system generated Order ID.



- Both the in-portal and email notifications will be triggered by the system regardless if the medication(s) required or did not require override.
- Both the in-portal and email notifications will trigger one Order ID per pharmacy regardless if multiple medications were ordered for multiple pharmacies.
- If the order encounters the 'Medication Requires Override = Yes' flag, then the in-portal and email notifications will be triggered after all the override record(s) on the 'Order Conflicts' screen have been resolved (either by submitting or removing).
    - *For example, if there are 3 medications on the Order Conflicts screen, once the third record has had a decision made (either submitting or removing), only then the in-portal and email notifications will be triggered.*

Feature Updates: Sprint 17

Pharmacy Pharmacy Assignment & Deactivation Notification Enhancements

When a TCT User navigates to the Assign/Change Pharmacy and Drug Regimen screens via a Client's profile, the following enhancements will occur:

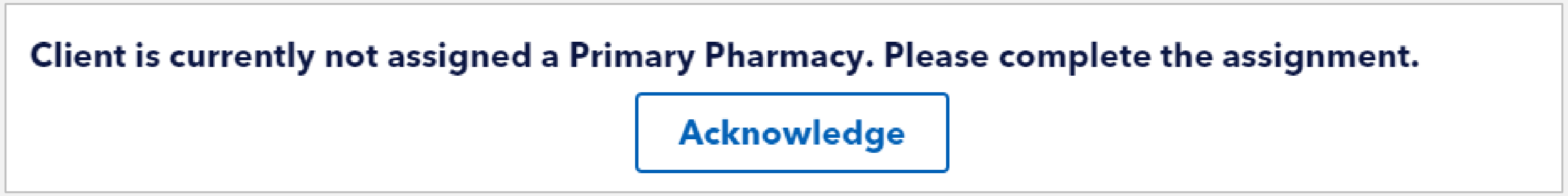
Primary Pharmacy Assignment

- If the Client does not have a Primary Pharmacy assigned, a validation message pop up will display on the Assign/Change Pharmacy screen, stating the following:
    - "Client is currently not assigned a Primary Pharmacy. Please complete the assignment."
        - The validation message will include an "Acknowledge" button that the User must click on before proceeding further.

- If the Client does not have a Primary Pharmacy assigned, a validation message pop up will display on the Drug Regimen screen, stating the following:
    - "Client is currently not assigned a Primary Pharmacy. Please complete the assignment."
        - The validation message pop up will include an "Acknowledge' button that the User must click on before proceeding further.

- Once a Primary Pharmacy is assigned to a Client's profile, the validation message pop ups will no longer appear on the Assign/Change Pharmacy and Drug Regimen screens.

- The pharmacy assignment enhancement pop up on the Assign/Change Pharmacy and Drug Regimen screens applies **only** to Primary Pharmacies and does not apply to Secondary Pharmacies.



Feature Updates: Sprint 17

Pharmacy Pharmacy Assignment & Deactivation Notification Enhancements Cont.

Primary Pharmacy Deactivated

- If the Client does have a Primary Pharmacy assigned that is deactivated, a validation message pop up will display on the Assign/Change Pharmacy screen, stating the following:
    - "Client's current Primary Pharmacy is deactivated. Please update the Pharmacy assignment."
        - The validation message will include an "Acknowledge" button that the User must click on before proceeding further.
- If the Client does have a Primary Pharmacy assigned that is deactivated, a validation message pop up will display on the Drug Regimen screen, stating the following:
    - "Client's current Primary Pharmacy is deactivated. Please update the Pharmacy assignment."
        - The validation message will include an "Acknowledge" button that the User must click on before proceeding further.

Secondary Pharmacy Deactivated

- If the Client does have a Secondary Pharmacy assigned that is deactivated, a validation message pop up will display on the Assign/Change Pharmacy screen, stating the following:
    - "Client's current Secondary Pharmacy is deactivated. Please update the Pharmacy assignment."
        - The validation message will include an "Acknowledge" button that the User must click on before proceeding further.
- If the Client does have a Secondary Pharmacy assigned that is deactivated, a validation message pop up will display on the Drug Regimen screen, stating the following:
    - "Client's current Secondary Pharmacy is deactivated. Please update the Pharmacy assignment."
        - The validation message will include an "Acknowledge" button that the User must click on before proceeding further.

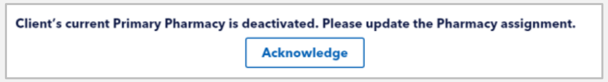
Feature Updates: Sprint 17

Pharmacy Pharmacy Assignment & Deactivation Notification Enhancements Cont.

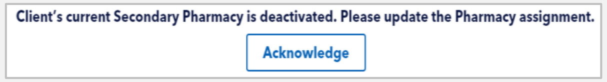
Primary Pharmacy & Secondary Pharmacy Deactivated

- If the Client has both a Primary Pharmacy and a Secondary Pharmacy assigned that is deactivated, a validation message pop up will display on the Assign/Change Pharmacy screen, stating the following:
  - "Client's current Primary Pharmacy is deactivated. Please update the Pharmacy assignment."
  - "Client's current Secondary Pharmacy is deactivated. Please update the Pharmacy assignment."
    - The validation message will include an "Acknowledge" button that the User must click on before proceeding further.
- If the Client has both a Primary Pharmacy and Secondary Pharmacy assigned that is deactivated, a validation message pop up will display on the Drug Regimen screen, stating the following:
  - "Client's current Primary Pharmacy is deactivated. Please update the Pharmacy assignment."
  - "Client's current Secondary Pharmacy is deactivated. Please update the Pharmacy assignment."
    - The validation message will include an "Acknowledge" button that the User must click on before proceeding further.

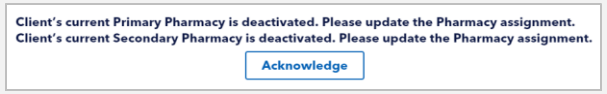
Primary



Secondary



Primary & Secondary



Feature Updates: Sprint 17

Reports Ad Hoc Report Export Enhancements

When a User navigates to the Ad Hoc Query Builder via the 'Admin' tile, the following enhancements will occur:

- Users will now be able to view their selected data elements in the report output when exporting the Ad Hoc Report.
  - If a particular data element(s) is not selected by the User, the column value will read as 'N/A'.

- The Ad Hoc report output will include the following two new worksheets:
  1. Report Selection
  2. Client Data

- The below column headers and values will display on the 'Report Selection' worksheet:
  - Data Source
    - This column will display the 'Data Source' value selected by the User when querying the report.
  - Table Name
    - This column will display the picklist values selected for the 'Table Name' and 'Column Name' fields on the 'Add Table Column Detail Record' pop up.
    - This column will be blank if no value is selected by the User.
  - Column Name
    - This column will display the picklist values selected for the 'Column Name' on the 'Filter Detail Record' pop up.
    - If a 'Column Name' value is selected by the User, then 'Operator' and 'Value' fields will be mandatory.
    - This column will be blank if no value is selected by the User.
    - The 'Table and Column Details' screen will only allow up to 12 filter combination entries via the 'Add Record' button.
      - Error validation message will display if more than 12 entries are added: "At max only 12 columns can be selected."

Feature Updates: Sprint 17

Reports Ad Hoc Report Export Enhancements Cont.

- Filter Details
  - This column will display the ‘Operator’ and ‘Value’ values selected and inputted by the User on the ‘Filter Details Record’ pop up.
    - This column will display multiple operators as separate rows/records.
    - This column will be blank if no ‘Column Name’ is selected by the User.
    - The ‘Filter Details’ screen will not cap the # of filter combination entries added via the ‘Add Record’ button.

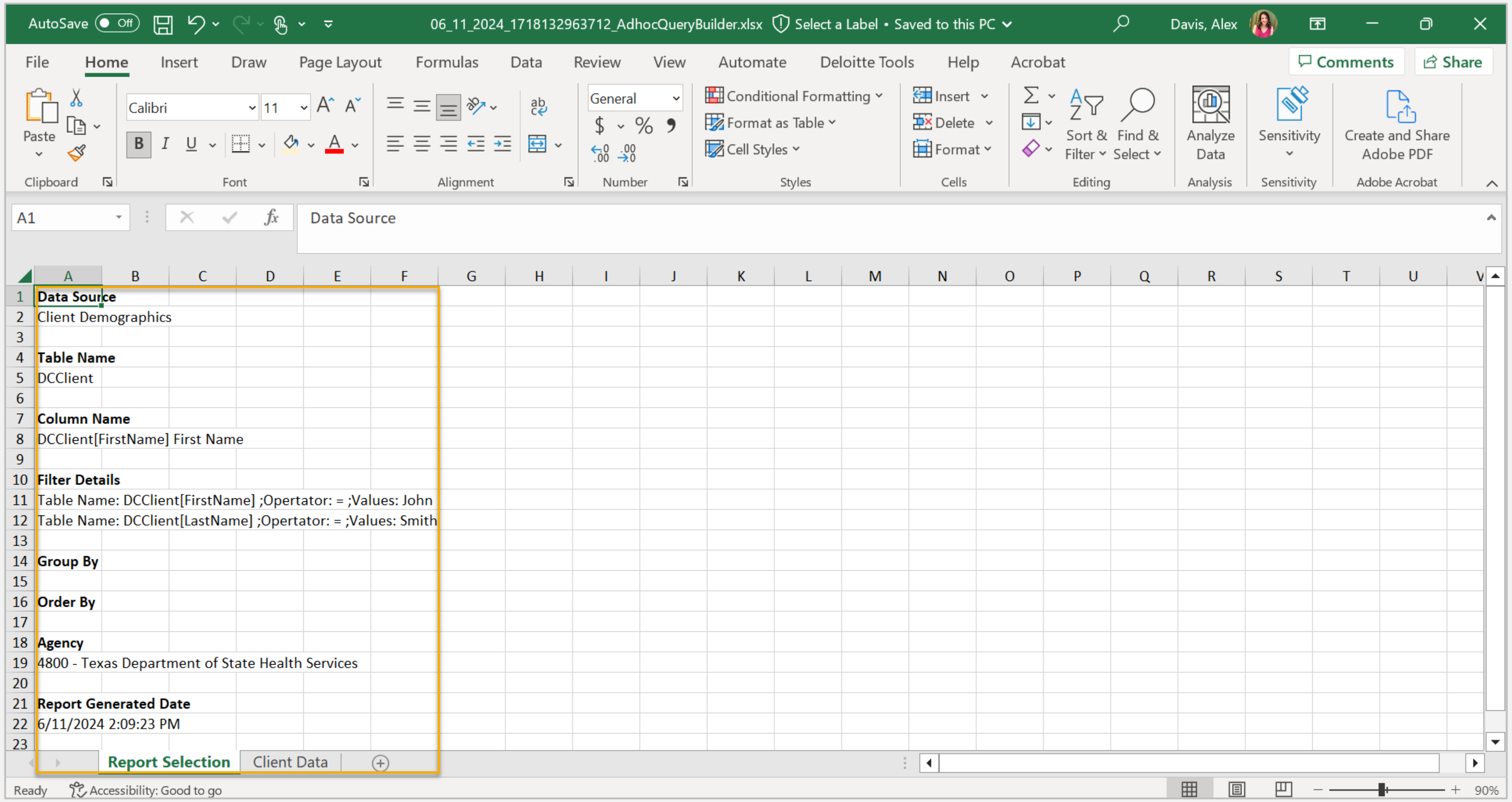
- Group By and Order By
  - This column will display the ‘Order By’, ‘Select Column for Aggregation’, and ‘Aggregate By’ values selected on the ‘Group By and Order By Details’ screen.
  - This column will be blank if no value is selected by the User.

- Agency
  - This column will display the active Provider Agency(ies) & Admin Agency(ies) selected on the ‘Agency Or Administrative Agency’ multi-select, drop down field.
  - Users will be able to view and select the agency(ies) they are associated to.
  - HRAR Admins will have full access to all agencies in the ‘Agency Or Administrative Agency’ search field.
    - HRAR Admins will be able to select the 4800 – Texas Department of State Health Services agency option which will disable the multi-select capability.
  - Once the User selects the Admin Agency, they will <u>not</u> be able to select any other Provider Agency(ies) that fall under the Admin Agency(ies).
  - AA Data Manager Users will only be able to view Provider Agencies associated to them.

- Report Generation Date
  - This column will display the date and timestamp the Ad Hoc Query report output was generated by the User.
    - Format: MM/DD/YYYY HH:MM:SS AM/PM

Feature Updates: Sprint 17

Reports Ad Hoc Report Export Enhancements Cont.



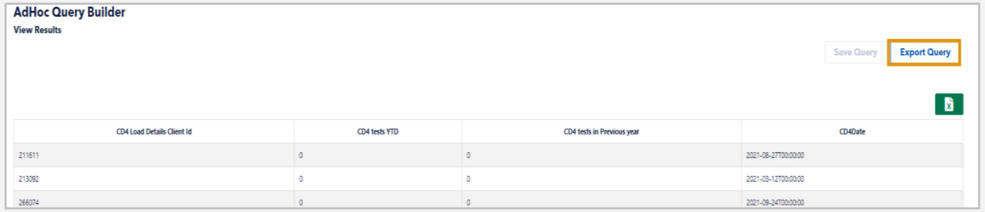
Feature Updates: Sprint 17

Reports Ad Hoc Report Export Enhancements Cont.

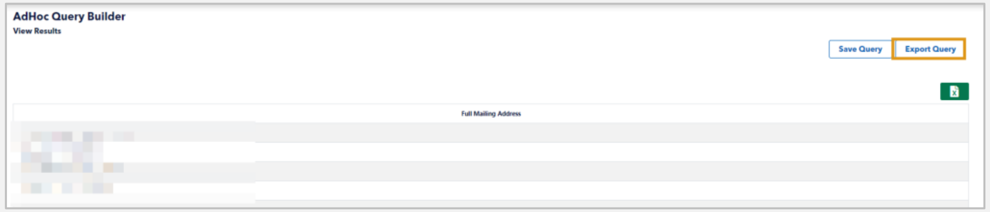
The enhancements to the Ad Hoc Query Report export will be applicable to both saved and new queries.

- Ad Hoc saved query exports can be generated by clicking on the 'Run' action on the 'Query History Details' screen.
  - Pre-Condition: Users will be required to select an Admin Agency via the 'Agency Or Administrative Agency' multi-select, drop down field.
- Ad Hoc saved and new queries can be ran/generated by clicking on the 'Export Query' button on the 'View Results' screens.

Saved Query(ies) on the Filter Details Screen



New Query(ies) on the Agency Selection Screen



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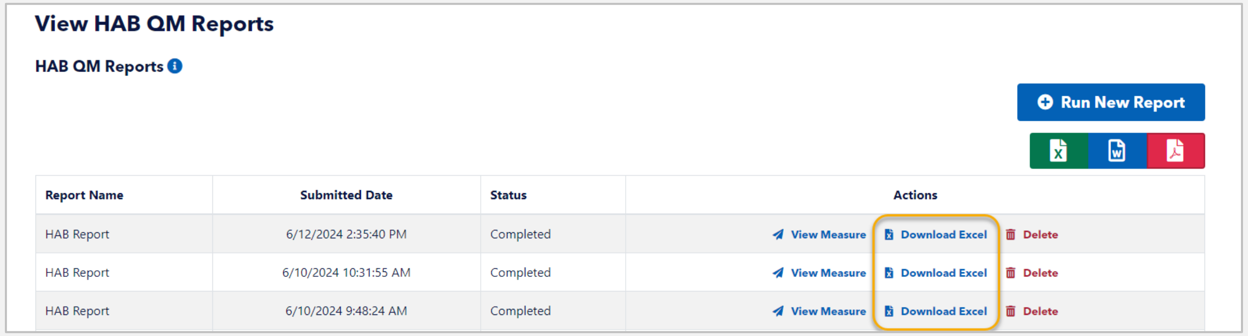
Feature Updates: Sprint 17

Reports HAB Report Export Enhancements

When a TCT User navigates to the View HAB QM Reports screen via the 'Reports' tile, the following enhancements will occur:

- A new action titled 'Download Excel' will appear under the 'Actions' column on the View HAB QM Reports screen.
  - This new 'Download Excel' button will download the rendered HAB Report in the browser and will open the report output in the User's Excel desktop application.



- The HAB report output will now include the below two worksheets:
  - ReportCriteria
  - ReportData

- The 'ReportCriteria' worksheet will include the following information:
  - Date of Query
    - This will be the date the HAB report query was conducted.
    - Format: MM/DD/YYYY

Feature Updates: Sprint 17

Reports HAB Report Export Enhancements Cont.

- Reporting End Date
  - This column will display the value the User selects for the ‘Reporting Period End Date’ field on the HAB QM Measures Report screen when curating the report.
    - Format: MM/DD/YYYY

- Are You Running This Report for ADAP Measures?
  - This column will display the value the User selects for the ‘Are you running this report for ADAP measures?’ field on the HAB QM Measures Report screen when curating the report.
    - Format: Yes, No

- Agency(ies)
  - This column will display the value(s) the User selects for the ‘Agency or Agencies’ field on the HAB QM Measures Report screen when curating the report.
  - Users will be able to view the agency(ies) they are associated to.
  - Admins will have access to the complete list of options on the ‘Agency or Agencies’ search field.
  - If multiple agencies are selected, the values will appear as comma separated.
  - There will be no cap on the # of agency(ies) the User can select on the HAB QM Measures Report screen.

- Funding Source(s)
  - This column will display the value(s) the User selects for the ‘Funding Source(s)’ field on the HAB QM Measures Report screen when curating the report.
  - If multiple funding sources are selected, the values will appear as comma separated.

Feature Updates: Sprint 17

Reports HAB Report Export Enhancements Cont.

- Contract(s)
  - This column will display the value(s) the User selects for the ‘Contract(s)’ field on the HAB QM Measures Report screen when curating the report.
  - If multiple contracts are selected, the values will appear as comma separated.

- Service(s)
  - This column will display the value(s) the User selects for the ‘Service(s)’ field on the HAB QM Measures Report screen when curating the report.
  - If multiple services are selected, the values will appear as comma separated.

- Client Age Range Start
  - This column will display the value the User enters for the ‘Client Age Range Start’ field on the HAB QM Measures Report screen when curating the report.
  - The ‘Client Age Range Start’ free text field accepts numerical values only.

- Client Age Range End
  - This column will display the value the User enters for the ‘Client Age Range End’ field on the HAB QM Measures Report screen when curating the report.
  - The ‘Client Age Range End’ free text field accepts numerical values only.

- Gender
  - This column will display the value(s) the User selects for the ‘Gender’ field on the HAB QM Measures Report screen when curating the report.
  - If multiple genders are selected, the values will appear as comma separated.

Feature Updates: Sprint 17

Reports HAB Report Export Enhancements Cont.

- Race
  - This column will display the value(s) the User selects for the ‘Race’ field on the HAB QM Measures Report screen when curating the report.
  - If multiple races are selected, the values will appear as comma separated.

- Ethnicity
  - This column will display the value(s) the User selects for the ‘Ethnicity’ field on the HAB QM Measures Report screen when curating the report.
  - If multiple ethnicities are selected, the values will appear as comma separated.

- HIV Exposure
  - This column will display the value(s) the User selects for the ‘Exposure’ field on the HAB QM Measures Report screen when curating the report.
  - If multiple values are selected, the values will appear as comma separated.

- Household Poverty Level Start
  - This column will display the value the User enters for the ‘Household Poverty Level Start’ field on the HAB QM Measures Report screen when curating the report.
  - The ‘Household Poverty Level Start’ free text field accepts numerical values only.

- Household Poverty Level End
  - This column will display the value the User enters for the ‘Household Poverty Level End’ field on the HAB QM Measures Report screen when curating the report.
  - The ‘Household Poverty Level End’ free text field accepts numerical values only.

Feature Updates: Sprint 17

Reports HAB Report Export Enhancements Cont.

- County
  - This column will display the value(s) the User selects for the ‘County’ field on the HAB QM Measures Report screen when curating the report.
  - If multiple values are selected, the values will appear as comma separated.

- Client Status
  - This column will display the value(s) the User selects for the ‘Client Status’ field on the HAB QM Measures Report screen when curating the report.
  - If multiple values are selected, the values will appear as comma separated.

- Ignore Indicator Exclusion
  - This section is checkbox based on the HAB QM Measures Report screen.
  - If the checkbox is selected, then on the report export, the User will view: ‘Yes’
  - If the checkbox is <u>not</u> selected, then on the report export, the User will view: ‘N/A’

- Core Measures
  - This section is checkbox based on the HAB QM Measures Report screen.
  - If any of the Performance Measures are selected, then on the report export, the User will view those value(s) which were checked off.
  - If multiple values are selected, the values will appear as comma separated.

- All Ages Measures
  - This section is checkbox based on the HAB QM Measures Report screen.
  - If any of the Performance Measures are selected, then on the report export, the User will view those value(s) which were checked off.
  - If multiple values are selected, the values will appear as comma separated.

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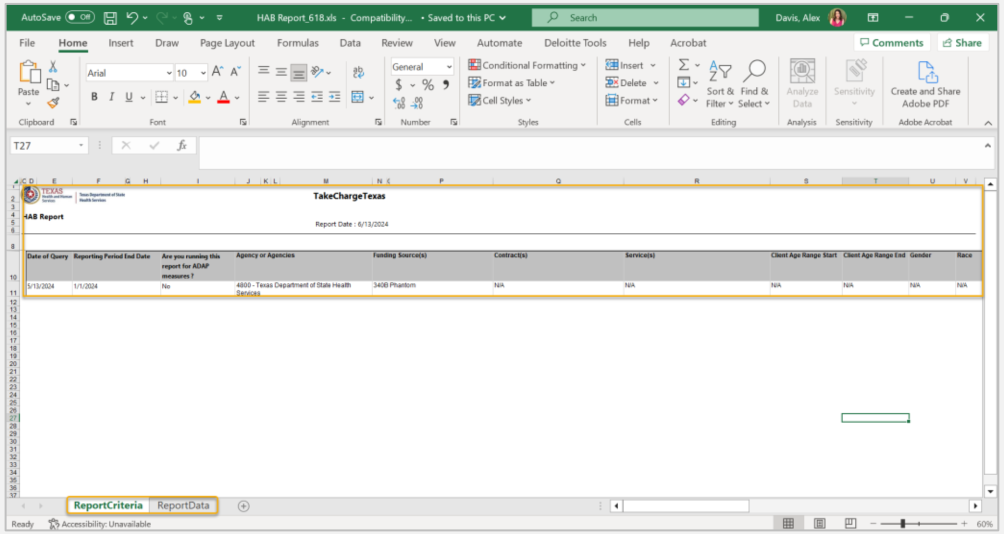
Feature Updates: Sprint 17

Reports HAB Report Export Enhancements Cont.

- Adolescent Adult
  - This section is checkbox based on the HAB QM Measures Report screen.
  - If any of the Performance Measures are selected, then on the report export, the User will view those value(s) which were checked off.
  - If multiple values are selected, the values will appear as comma separated.

- ADAP
  - This section is checkbox based on the HAB QM Measures Report screen.
  - If any of the Performance Measures are selected, then on the report export, the User will view those value(s) which were checked off.
  - If multiple values are selected, the values will appear as comma separated.



The first worksheet tab on the HAB report output, ‘ReportCriteria’, will display ‘N/A’ values for any column values not selected or inputted by the User on the HAB QM Measures Report screen.

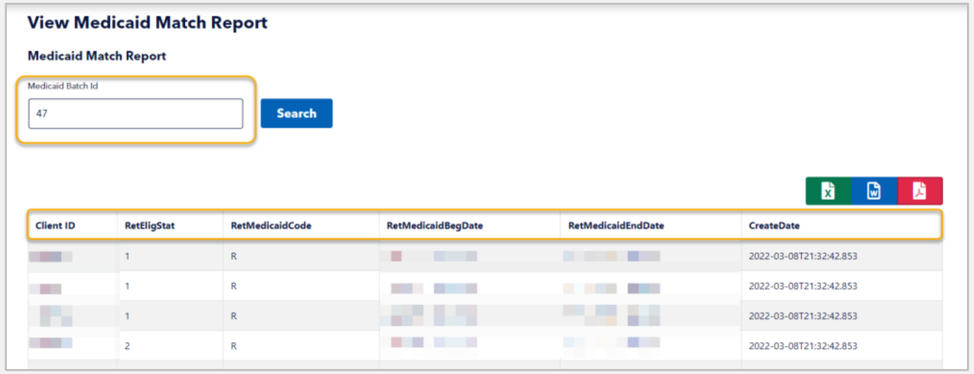
The second worksheet tab on the HAB report output, ‘ReportData’, will display the client level information which is curated based on the selections made above by the User on the HAB QM Measures Report screen.

Feature Updates: Sprint 17

Reports Medicaid Match Report

When a TCT User navigates to the new Medicaid Match Report via the ‘Reports’ tile, the following enhancements will occur:

- Pre-Conditions:
    - User clicks on the ‘Medicaid Match Report’ hyperlink found under the ‘Reports’ drop down.
    - User then lands on the View Medicaid Match Report screen.
    - User enters the ‘Medicaid Batch ID’ value and clicks the ‘Search’ button.
        - The ‘Medicaid Batch ID’ field accepts numerical values only.
        - The Medicaid Batch ID # will be communicated to Program via an email notification.



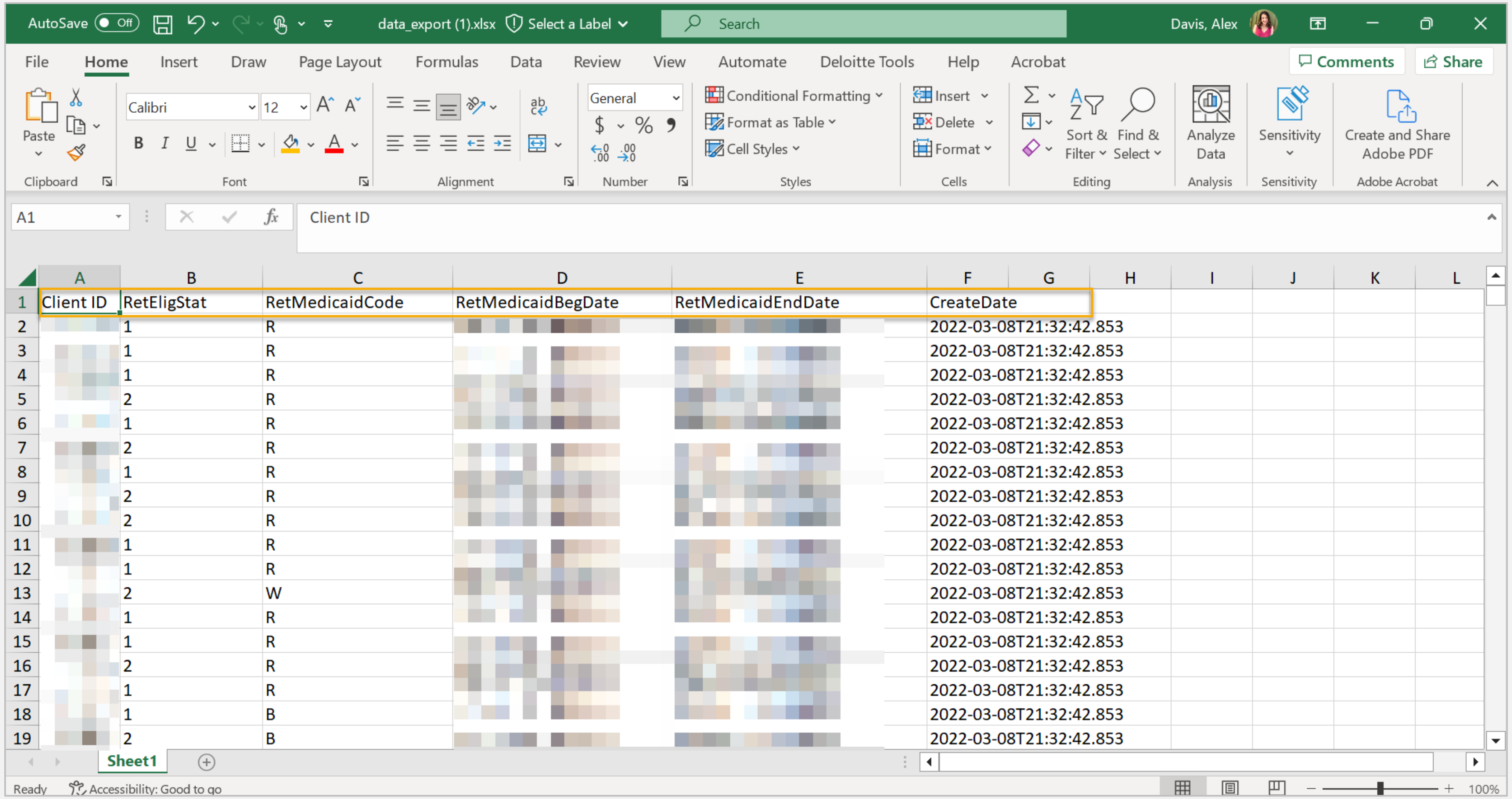
- The Medicaid Match Report export will display the following columns in the report output:
    - Client ID
    - RetEligStat
    - RetMedicaidCode
    - RetMedicaidBegDate
    - RetMedicaidEndDate
    - CreateDate

- The Medicaid Match Report can be exported in the following formats: Excel, Word, PDF.

- Only HRAR Admins will have access to the Medicaid Match Report.
    - HRAR Admins can add additional user roles using the Role to Screen Mapping feature.

Feature Updates: Sprint 17

Reports Medicaid Match Report Cont.



Client ID	RetEligStat	RetMedicaidCode	RetMedicaidBegDate	RetMedicaidEndDate	CreateDate
	1	R			2022-03-08T21:32:42.853
	1	R			2022-03-08T21:32:42.853
	1	R			2022-03-08T21:32:42.853
	2	R			2022-03-08T21:32:42.853
	1	R			2022-03-08T21:32:42.853
	2	R			2022-03-08T21:32:42.853
	1	R			2022-03-08T21:32:42.853
	2	R			2022-03-08T21:32:42.853
	2	R			2022-03-08T21:32:42.853
	1	R			2022-03-08T21:32:42.853
	1	R			2022-03-08T21:32:42.853
	2	W			2022-03-08T21:32:42.853
	1	R			2022-03-08T21:32:42.853
	1	R			2022-03-08T21:32:42.853
	2	R			2022-03-08T21:32:42.853
	1	R			2022-03-08T21:32:42.853
	1	B			2022-03-08T21:32:42.853
	2	B			2022-03-08T21:32:42.853

Feature Updates: Sprint 17

Reports Clients with Medicare Insurance Report

When a TCT User now navigates to the Clients with Medicare Insurance Report via the 'Reports' drop down, the following enhancements will occur:

- The new 'Clients with Medicare Insurance Report' will appear beneath the pre-existing Worker Performance Report: All Applications report.
- The following user roles will have access to the Clients with Medicare Insurance Report:
  - HRAR Admin
  - DSHS Program Staff
  - Agency Client Services Supervisor/Manager
  - AA Data Managers
  - AA Program Staff

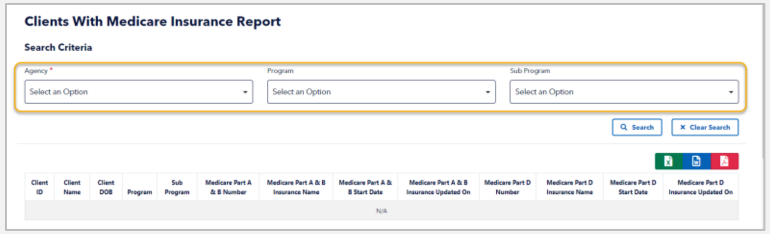
- The logic of the 'Clients With Medicare Insurance Report' will be as follows:
  - Clients who CURRENTLY have Medicare saved as their Insurance in their profiles (meaning Medicare Part A & B and/or Part D is saved as their only insurance or as one of their insurances on the 'Insurance Information' and 'Insurance History' screens) will appear on this report.
  - Any Client who previously had Medicare (Part A & B and/or Part D) as their insurance but currently DOES NOT have Medicare, will not appear on this report.

- The following search criteria fields will exist on the Clients with Medicare Insurance Report:
  - Agency
    - Mandatory, single-select drop down field.
    - This drop down search field will contain the picklist values for all Active provider agencies in the TCT system.
      - When an Agency Client Services Supervisor/Manager, AA Data Manager, and/or AA Program Staff User is curating the report, the 'Agency' search field drop down will only render provider agencies associated to that User.
    - This drop down search field will have the option of 4800 – Texas Department of State Health Services.
  - Program
    - Multi-select, optional drop down search field with the following picklist values available for selection:
      - CARE
      - THMP

Feature Updates: Sprint 17

Reports Clients with Medicare Insurance Report Cont.

- Sub Program
  - Multi-select, optional drop down search field with the following picklist values available for selection:
    - If CARE is selected in the ‘Program’ search field, the following Sub Programs will display:
      - MAI
      - RW CARE
    - If THMP is selected in the ‘Program’ search field, the following Sub Programs will display:
      - ADAP
      - SPAP
      - TIAP



- The order of the records in the results table will be in descending order (latest Medicare Part A & B Insurance Updated On OR Medicare Part D Insurance Updated On date record will appear on top).
- The Clients with Medicare Insurance Report will only render Active Clients who have Medicare selected as their current insurance or one of their insurances.
- The Clients with Medicare Insurance Report will follow the logic of Share Status where if a Client has selected ‘No’ for Share Status, and has indicated a specific agency, the Client will be displayed on the report for that particular agency only.
- The Clients with Medicare Insurance Report will have the following export capabilities: Excel, Word, PDF.

Feature Updates: Sprint 17

Reports Clients with Medicare Insurance Report Cont.

- The Clients with Medicare Insurance Report will have the following column headers and system generated values upon exporting the report:
    - Client ID
    - Client Name
    - Client DOB
    - Program
        - CARE, THMP
        - This column will indicate the Client’s latest Program for which a decision was made (Approved, Denied, Reject, or Pend)
            - *Reject not applicable to the CARE program*
        - If the client DOES NOT have a decision for their eligibility, this column will display ‘N/A’.
    - Sub Program
        - CARE: MAI, RW CARE
        - THMP: ADAP, SPAP, TIAP
            - This column will populate as applicable based on the Program-Sub Program combination for the Client.
            - This column will populate the Sub Program that the TCT Staff Member made a decision on, and NOT, the Sub Program the Client applied for.
            - If the client DOES NOT have a decision for their eligibility, this column will display ‘N/A’.
    - Medicare Part A & B Number
        - This column will display the value provided in the ‘Medicare Number’ field found on the ‘Insurance Information’ screen of a Client’s profile and will reflect the same value in the ”Medicare Part A & B Number’ column on the Clients with Medicare Insurance Report.
        - This column will be blank if no value was provided in the ‘Medicare Number’ field found on the ‘Insurance Information’ screen in a Client’s profile.

Feature Updates: Sprint 17

Reports Clients with Medicare Insurance Report Cont.

- Medicare Part A & B Insurance Name
    - This column will display the value provided in the ‘Medical Insurance Name’ field found on the ‘Insurance Information’ screen of a Client’s profile.
    - This column will be blank if no value was provided in the ‘Medicare Insurance Name’ field found on the ‘Insurance Information’ screen in a Client’s profile.
- Medicare Part A & B Start Date
    - This column will display the value provided in the ‘Start Date’ field found on the ‘Insurance Information’ screen of a Client’s profile.
        - Format: MM/DD/YYYY
    - This column will be blank if no value was provided in the ‘Start Date’ field found on the ‘Insurance Information’ screen in a Client’s profile.
- Medicare Part A & B Insurance Updated On
    - This column will display the date in which a Medicare Part A & B insurance was ADDED to the Client’s profile.
        - Format: MM/DD/YYYY
- Medicare Part D Number
    - This column will display the value provided in the ‘Medicare Number’ field found on the ‘Insurance Information’ screen of a Client’s profile and will reflect the same value in the ”Medicare Part D Number’ column on the Clients with Medicare Insurance Report.
    - This column will be blank if no value was provided in the ‘Medicare Number’ field found on the ‘Insurance Information’ screen in a Client’s profile.
- Medicare Part D Insurance Name
    - This column will display the value provided in the ‘Medical Insurance Name’ field found on the ‘Insurance Information’ screen of a Client’s profile.
    - This column will be blank if no value was provided in the ‘Medicare Insurance Name’ field found on the ‘Insurance Information’ screen in a Client’s profile.
- Medicare Part D Start Date
    - This column will display the value provided in the ‘Start Date’ field found on the ‘Insurance Information’ screen of a Client’s profile.
        - Format: MM/DD/YYYY
- Medicare Part D Insurance Updated On
    - This column will display the date in which a Medicare Part D insurance was ADDED to the Client’s profile.
        - Format: MM/DD/YYYY

Feature Updates: Sprint 17

Reports Clients with Medicare Insurance Report Cont.

Clients With Medicare Insurance Report

Search Criteria

Agency *: 4800 - Texas Department of State Health Services

Program: THMP × CARE ×

Sub Program: ADAP × RW Care ×

Search | Clear Search

Client ID	Client Name	Client DOB	Program	Sub Program	Medicare Part A & B Number	Medicare Part A & B Insurance Name	Medicare Part A & B Start Date	Medicare Part A & B Insurance Updated On	Medicare Part D Number	Medicare Part D Insurance Name	Medicare Part D Start Date	Medicare Part D Insurance Updated On
[illegible]	[illegible]	[illegible]	THMP,CARE,THMP,CARE	ADAP,RWCARE,ADAP,RWCARE	[illegible]	[illegible]	09/20/2013	05/09/2024			08/12/2012	05/09/2024
[illegible]	[illegible]	[illegible]	CARE,CARE,CARE	MAI,RWCARE,MAI				03/26/2024				
[illegible]	[illegible]	[illegible]	THMP,THMP,CARE,THMP,CARE,THMP,THMP,CARE,THMP,THMP,CARE	SPAP,SPAP,RWCARE,SPAP,RWCARE,SPAP,SPAP,RWCARE,SPAP,SPAP,RWCARE	[illegible]		12/01/2022	02/06/2024	[illegible]		01/01/2024	02/06/2024
[illegible]	[illegible]	[illegible]	THMP,CARE,CARE,CARE	RWCARE,RWCARE,ADAP,RWCARE	[illegible]	[illegible]	06/01/2006	01/23/2024	[illegible]	[illegible]	02/01/2024	01/23/2024
[illegible]	[illegible]	[illegible]	CARE	RWCARE	[illegible]	[illegible]	12/01/2008	02/08/2024		[illegible]		
[illegible]	[illegible]	[illegible]	THMP,THMP,CARE,THMP,THMP	ADAP,ADAP,RWCARE,ADAP,ADAP	[illegible]		01/01/2024	02/05/2024	[illegible]		01/01/2024	02/05/2024
[illegible]	[illegible]	[illegible]	THMP,THMP,CARE,THMP	SPAP,SPAP,RWCARE,SPAP	[illegible]		02/12/2011	02/02/2024	[illegible]		02/01/2011	02/03/2024
[illegible]	[illegible]	[illegible]	CARE,THMP	RWCARE,ADAP			01/01/2004	01/23/2024			01/01/2024	01/23/2024
[illegible]	[illegible]	[illegible]	THMP	ADAP			01/01/2024	01/16/2024				
[illegible]	[illegible]	[illegible]	THMP	ADAP	[illegible]		04/01/2017	02/09/2024	[illegible]		04/01/2017	02/09/2024
[illegible]	[illegible]	[illegible]	THMP,THMP,CARE,THMP,THMP	ADAP,RWCARE,ADAP,ADAP,ADAP			10/01/2021	01/28/2024			12/01/2023	01/28/2024
[illegible]	[illegible]	[illegible]	THMP,THMP	SPAP,ADAP	[illegible]		02/01/2023	01/26/2024	[illegible]		02/01/2023	01/26/2024
[illegible]	[illegible]	[illegible]	THMP,CARE	RWCARE,ADAP	[illegible]		03/01/2012	01/24/2024	[illegible]		03/01/2012	01/24/2024

Feature Updates: Sprint 17

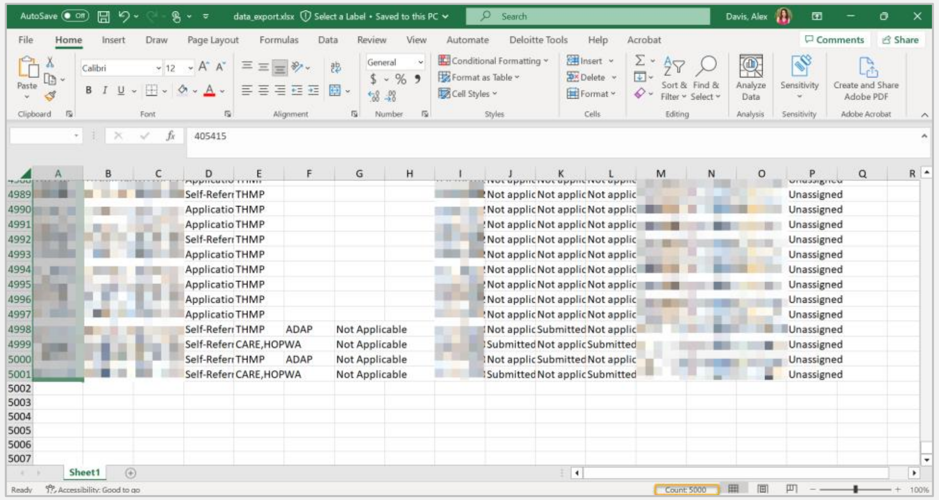
Task Board Task Board Export Enhancements

When a TCT User navigates to the Task Board via the ‘TaskBoard’ tile, the following enhancements will occur:

- Users will now be able to view and select up to 5,000 client records on the Task Board screen.
  - To accommodate this enhancement, the results table will now default to display up to 300 client records paginated.
    - The results table view can be altered by selecting the # of client records to display, either 15, 30, 50, 100, 300, 500, or 1000.

- Users will now have the capability to export the 5,000 client records via the following formats: Excel, Word, PDF.

- Regardless of the # of client records to display on the Task Board results table, the system will export the full 5,000 client records in the report output.



Feature Updates: Sprint 17

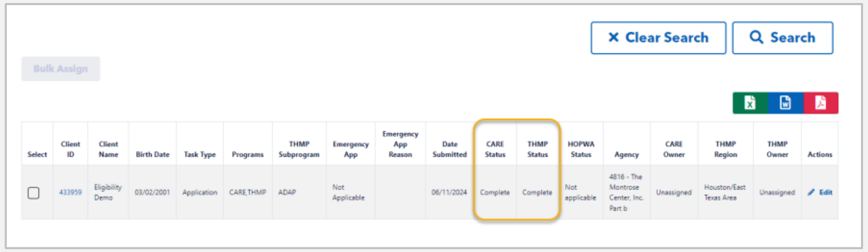
Task Board Notifications for Task Board Updates

When a TCT User has either processed the Client's THMP and/or CARE eligibility or has updated the initial assignment of a THMP and/or CARE Owner, the following enhancements will occur to the Task Board:

- Both in-portal and email notifications will be sent from the Task Board in the following scenarios:

  1. User has processed the Client's THMP and/or CARE eligibility via the Eligibility Period Selection screen.
     - As a result, the Task Board's 'THMP and/or CARE Status' column(s) update triggering the in-portal and email notifications.
       - Previously retained statuses (Submitted, Under Review, Secondary Review, etc.) will then update on the Task Board to 'Complete' based on the Approve / Deny / Reject scenarios.
         - *Reject not applicable to the CARE program*

  2. User has manually updated the initial assignment of the Client's THMP and/or CARE Owner.
     - As a result, the Task Board's 'THMP and/or CARE Owner' column(s) update triggering the in-portal and email notifications.
       - Status(es) will update from 'Submitted' to 'Assigned' only on the initial assignment.



Feature Updates: Sprint 17

Task Board Notifications for Task Board Updates Cont.

- This Task Board enhancement is applicable to the following Application Types:
  - New Application
  - Recertification
  - Self-Attestation
  - Change Request
  - Referral

- The below user roles will receive both the in-portal and email notifications from the Task Board. This includes both the User taking action on the Client's eligibility <u>AND</u> the Agency Client Services Staff Manager/Supervisor User(s) associated to the Agency the Client is tied to.
  - Users with permissions to process eligibility include:
    - AA Data Manager
    - AA Program Staff
    - Agency Admin Staff
    - Agency Client Services Staff
    - Agency Client Services Supervisor/Manager
      - *This is the specific set of Users who will receive the triggered in-portal and email notifications from the Task Board if not taking the action.*
    - DSHS Program Staff

- The in-portal Task Board notifications will include the following features:
  - <u>Subject:</u> Task Board Update Notification
  - <u>View Message</u>
    - This will be a hyperlinked button for the User to view the entirety of the message.
    - A pop up notification will display in the Notification Center stating the following:
      - "Client [Last Name, Firstname]'s [Application Type'] for [Program] has been updated on the Task Board. Please navigate to the Task Board to view the update."
    - The pop up will also include a 'Close' button which must be clicked on by the User to close out the notification.
    - An in-portal notification will be triggered by the system each time an update is made to the THMP and/or CARE Status columns and will be its own individual notification.
    - An in-portal notification will be triggered by the system only on the initial owner assignment made to the THMP and/or CARE Owner columns and will be its own individual notification.

Feature Updates: Sprint 17

Task Board Notifications for Task Board Updates Cont.

- The email Task Board notifications will include the following information:
  - Subject: Task Board Update Notification
  - Email Message:
    - "Client [Last Name, Firstname]'s [Application Type'] for [Program] has been updated on the Task Board. Please navigate to the TCT to view the further details."
    - An email notification will be triggered by the system each time an update is made to the THMP and/or CARE Status columns and will be its own individual notification.
    - An email notification will be triggered by the system only on the initial owner assignment to the THMP and/or CARE Owner columns and will be its own individual notification.

In Portal Task Board Notification – Eligibility Processed & Owner Assignment

Client Demo,Eligibility's New Application / Reapplication application for THMP Program has been updated on the Task Board. Please navigate to the Task Board to view the update.

Close

Client Demo,Eligibility's New Application / Reapplication application for CARE Program has been updated on the Task Board. Please navigate to the Task Board to view the update.

Close

^In portal Task Board notifications can be found via the Notification Center.

Email Task Board Notification – Eligibility Processed & Owner Assignment

Task Board Update Notification
<HRAR.Services@hhs.texas.gov>
Tuesday, June 11, 2024 12:45:49 PM
Deliverability Reply Forward Print Delete

Client 433959 New Application / Reapplication application for CARE Program has been updated on the Task Board. Please login to https://uatap.tct.dshs.texas.gov/ to view the further details.

Task Board Update Notification
<HRAR.Services@hhs.texas.gov>
Tuesday, June 11, 2024 12:25:08 PM
Deliverability Reply Forward Print Delete

Client 433959 New Application / Reapplication application for THMP Program has been updated on the Task Board. Please login to https://uatap.tct.dshs.texas.gov/ to view the further details.

^Email Task Board notifications can be found via the email address captured in the Client's profile.

Feature Updates: Sprint 17

Agency Portal Client Pages Ability to Delete Services Entries

When a TCT User navigates to the Client Services screen via the ‘Client Services’ drop down in a Client’s profile, the following enhancements will occur:

- Within the Client Services results table, a new button titled ‘Delete’ will appear under the ‘Actions’ column.
    - This ‘Delete’ action will only be enabled to HRAR Admins and AA Data Managers.
    - If the User is not an HRAR Admin or AA Data Manager, the User will not be able to view or click on the ‘Delete’ button.

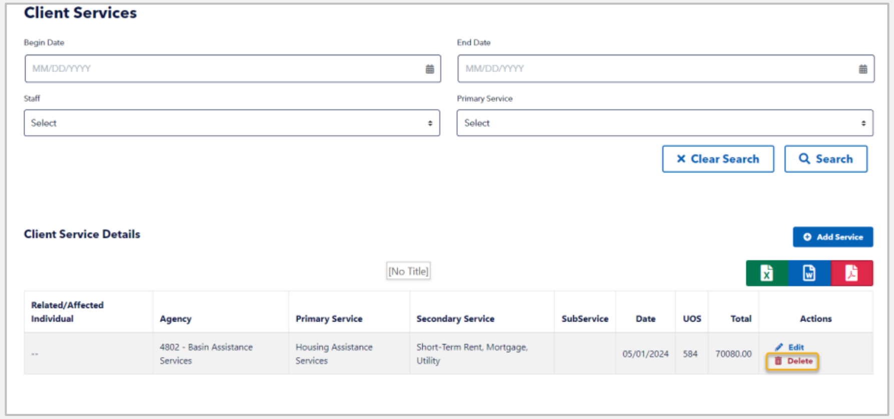
- When an HRAR Admin or AA Data Manager User clicks on the ‘Delete’ button, there will be a validation pop up that displays, stating the following:
    - “Please confirm you would like to proceed forward with deleting the Client Services record.”

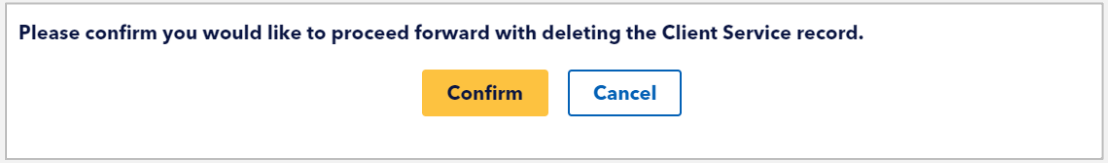
- The validation pop up will include the below two options for selection:
    - Confirm
        - When the ‘Confirm’ option is selected, the Client Service record will be deleted.
    - Cancel
        - When the ‘Cancel’ option is selected, the Client Service record will not be deleted and will remain intact.

- When an HRAR Admin or AA Data Manager then tries to search for the recently deleted Client Services record using the Client Services search criteria, the results table will not render the result.

- HRAR Admin or AA Data Managers can only delete one Client Services record at a time.

- When an Ad Hoc, RSR, STAR, or HAB Report is curated after the deletion of the Client Service record(s), the reports will display the results accordingly.





Feature Updates: Sprint 17

Eligibility Verification Checklist Screen

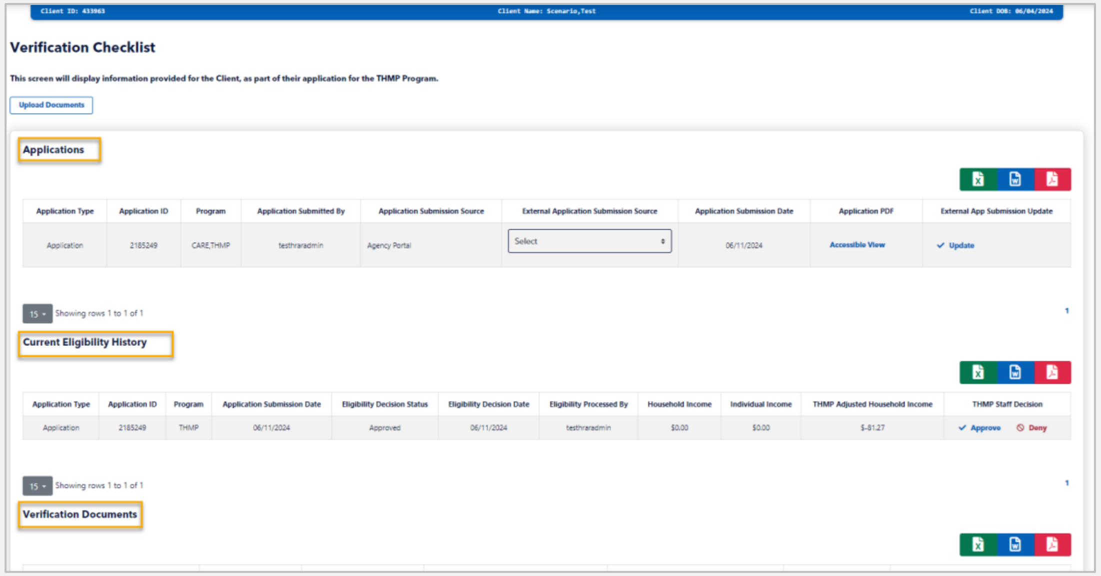
When a User navigates to the left navigation pane within a Client profile, the following enhancements will occur:

- A new drop down, titled 'THMP Specific Information', will be available after a Client's application has been submitted for the following user roles:
  - HRAR Admin
    - *HRAR Admins will have the ability to update the user roles for the THMP Specific Information via the Role to Screen Mapping feature.*
  - ADAP_Data_ManAdmin
  - ADAP_EW_PSI_PHPSII
  - ADAP_EW_PSIII
  - ADAP_PSIV_PSV

- Within the 'THMP Specific Information' drop down, there will be an available hyperlink titled 'Verification Checklist'.

- The Verification Checklist screen will have the following 3 sections:
  - Applications
  - Current Eligibility History
  - Verification Documents

- The below button will now be available on the Verification Checklist screen:
  - Upload Documents



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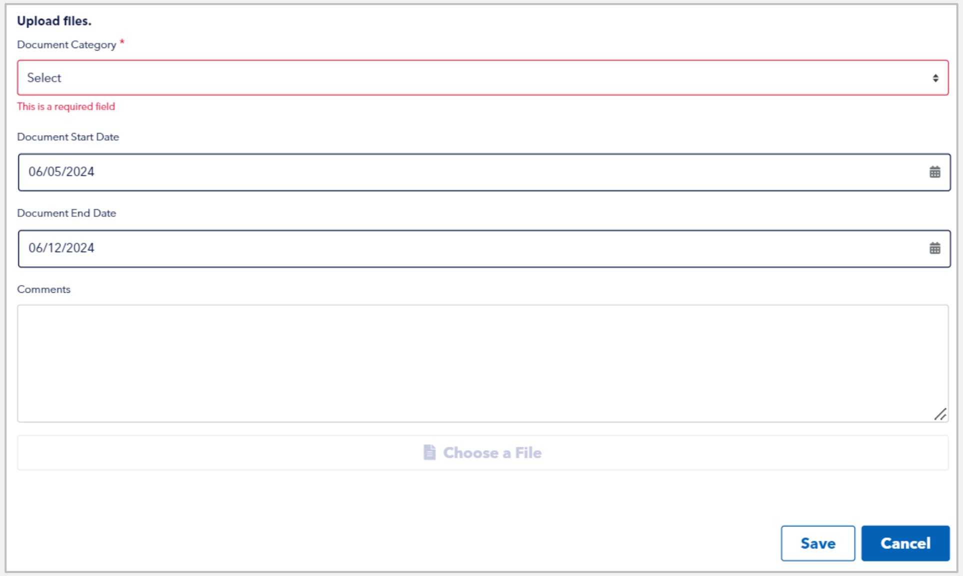
Feature Updates: Sprint 17

Eligibility Verification Checklist Screen Cont.

- When a User clicks on the new ‘Upload Documents’ button on the Verification Checklist screen, a pop up will appear on screen with the following fields:
  - Document Category
    - This will be a mandatory, single-select, drop down, with the following picklist values available for selection:
      - Other Documents
      - Proof HIV Positivity
      - Proof of Income
      - Proof of Insurance
      - Proof of Name Change
      - Proof of Texas Residency
      - Third Party Verification File - HMS Report
      - Third Party Verification File - CMS Report
      - Third Party Verification File - TIERS Report
      - Third Party Verification File - Databroker Report
      - Third Party Verification File - Letters



  - Document Start Date
    - This will be an optional calendar field.
      - Format: MM/DD/YYYY
  - Document End Date
    - This will be an optional calendar field.
    - The End Date cannot be a date prior to the ‘Document Start Date’.
      - Format: MM/DD/YYYY
  - Comments
    - This will be free text, optional field with a maximum character limit of 250.
  - Choose File
    - This will be a clickable button for the User to upload the specified document from their computer.
    - Once a User has successfully uploaded the document and clicked ‘Save’, the upload file pop up will close.
  - Save Button
    - This will save the uploaded file to the Client’s ‘Verification Documents’ section.
      - Validation message will appear on screen stating the following “1/1 Files uploaded successfully.”
  - Cancel Button
    - This will navigate the user back to the Verification Checklist screen.

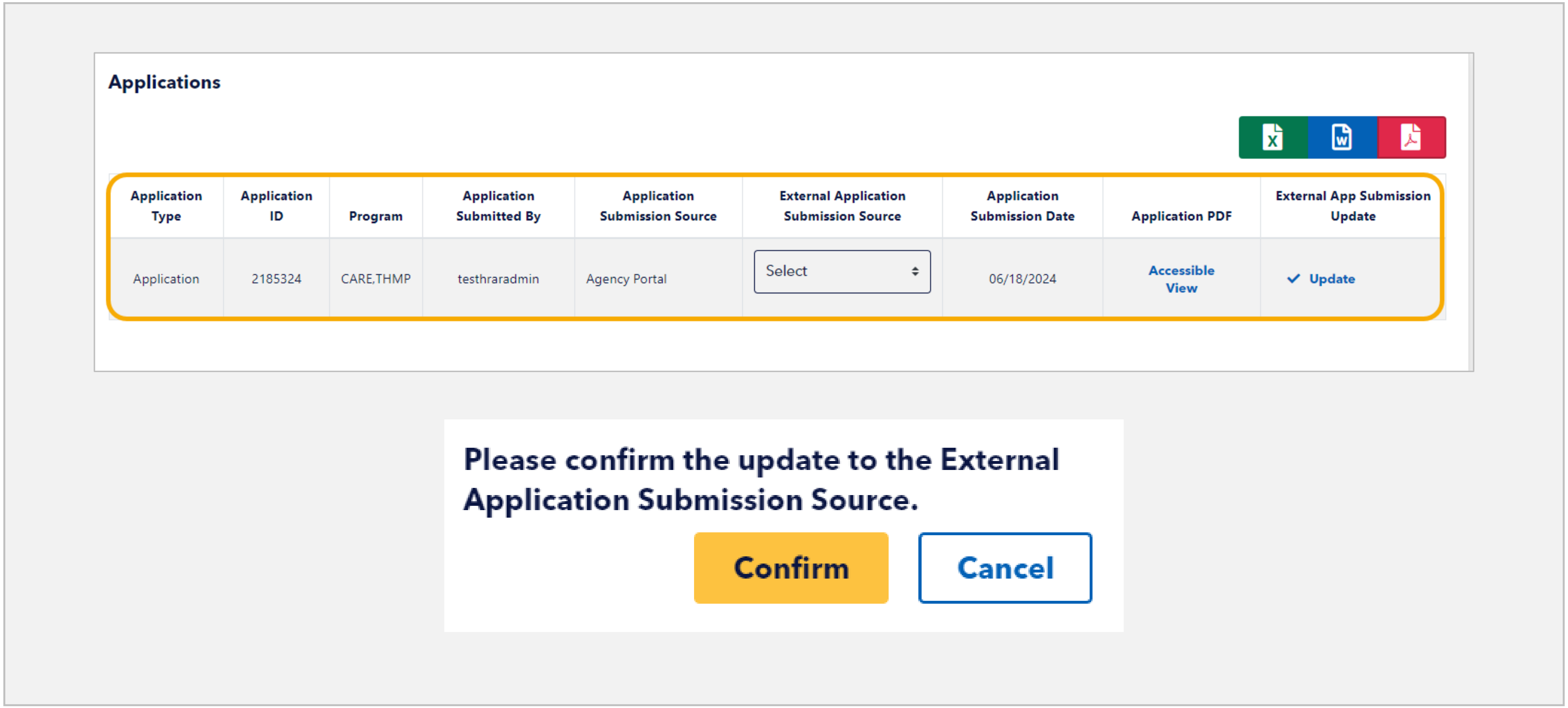
Feature Updates: Sprint 17

Eligibility Verification Checklist Screen Cont.

- Under the ‘Applications’ section of the Verification Checklist screen, there will be a table with the below columns:
  - Application Type
    - This column will display the type of application submitted for the Client.
    - This will be a system generated value and will be a non-editable.
  - Application ID
    - This column will display the Application ID for the applicable application submitted for the client.
    - This will be a system generated value and will be non-editable.
  - Program
    - This column will display the Program for the applicable application for which a decision was made.
      - CARE
      - THMP
  - Application Submitted By
    - This column will display the username of the submitter.
    - This will be a system generated value and will be non-editable.
  - Application Submission Source
    - This column will display the source of the application: Agency Portal, Client Portal.
    - This will be a system generated value and will be non-editable field.
  - External Application Submission Source
    - This column will be an optional, single-select drop down with the following options: Mail, Fax, Phone.
    - The User can manually select the original application source, as needed, as applicable.
  - Application Submission Date
    - This column will display the Date the application was submitted.
      - Format: MM/DD/YYYY
    - This will be a system generated value and will be non-editable.
  - Application PDF
    - This column will display the latest application in PDF format, hyperlinked.
    - When a User clicks on the hyperlink, it will trigger the document to open in a new tab.
  - External App Submission Update
    - This column will have a hyperlink titled ‘Update’.
    - When a User clicks on the ‘Update’ hyperlink in this column, a pop up will be triggered, stating the following message:
      - “Please confirm the update to the External Application Submission Source.”
        - There will be two options: Confirm, Cancel

Feature Updates: Sprint 17

Eligibility Verification Checklist Screen Cont.



Applications

Application Type	Application ID	Program	Application Submitted By	Application Submission Source	External Application Submission Source	Application Submission Date	Application PDF	External App Submission Update
Application	2185324	CARE,THMP	testhraradmin	Agency Portal	Select	06/18/2024	Accessible View	✓ Update

Please confirm the update to the External Application Submission Source.

Confirm

Cancel

Feature Updates: Sprint 17

Eligibility Verification Checklist Screen Cont.

- Under the 'Current Eligibility History' section of the Verification Checklist screen, there will be a results table with the below columns:
    - Application Type
        - This column will display the type of application submitted for the Client.
        - This will be a system generated value and will be a non-editable.
    - Application ID
        - This column will display the Application ID for the applicable application submitted for the client.
        - This will be a system generated value and will be non-editable.
    - Program
        - This column will display the Program for the applicable application for which a decision was made.
            - CARE
            - THMP
    - Application Submission Date
        - This column will display the Date the application was submitted.
            - Format: MM/DD/YYYY
        - This will be a system generated value and will be non-editable.
    - Eligibility Decision Status
        - This column will display the eligibility decision of the current application record (Approved, Denied, Rejected, Pend).
            - *Reject not applicable to the CARE Program*
        - If the application was initially marked as 'Pend', and a decision was made later, the column will display the latest eligibility decision on the application.
        - This will be a system generated value based on the eligibility decision/outcome and will be non-editable.
    - Eligibility Decision Date
        - This column will display the date the eligibility decision/outcome occurred.
            - Format: MM/DD/YYYY
        - This will be a system generated value and will be non-editable.
    - Eligibility Processed By
        - This column will display the username of the User who processed the eligibility on the current application.
        - This will be a system generated value based on the eligibility decision/outcome and will be non-editable.

Feature Updates: Sprint 17

Eligibility Verification Checklist Screen Cont.

- Under the 'Current Eligibility History' section of the Verification Checklist screen, there will be a results table with the below columns:
  - Household FPL
    - This column will display the Household FPL value calculated by the system when eligibility is being processed.
    - This will be a system generated value and will be non-editable.
  - Individual FPL
    - This column will display the Individual FPL value calculated by the system when eligibility is being processed.
    - This will be a system generated value and will be non-editable.
  - THMP Adjusted FPL
    - This column will display the THMP Adjusted FPL value calculated by the system when eligibility is being processed.
    - This will be a system generated value and will be non-editable.
  - This section will only include THMP applications and not CARE records.

Current Eligibility History

Application Type	Application ID	Program	Application Submission Date	Eligibility Decision Status	Eligibility Decision Date	Eligibility Processed By	Household FPL	Individual FPL	THMP Adjusted FPL
Application	2185324	THMP	06/18/2024	Approved	06/18/2024	testhraradmin	0.00	0.00	-81.27

Feature Updates: Sprint 17

Eligibility Verification Checklist Screen Cont.

- Under the 'Verification Documents' section of the Verification Checklist screen, there will be a results table with the below columns:
    - Document Category
        - This column will display the type of document submitted by the User as part of the THMP Program.
            - The values will be:
                - Other Documents
                - Proof HIV Positivity
                - Proof of Income
                - Proof of Insurance
                - Proof of Name Change
                - Proof of Texas Residency
                - Third Party Verification File - HMS Report
                - Third Party Verification File - CMS Report
                - Third Party Verification File - TIERS Report
                - Third Party Verification File - Databroker Report
                - Third Party Verification File - Letters
    - File Name
        - This column will display the name of the file uploaded by the User for the Client, hyperlinked.
        - When a User clicks on the hyperlink, it will trigger the document to open as a pdf.
    - Application ID
        - This column will display the Application ID as applicable to the application submitted for the client.
        - This will be a system generated value and will be non-editable.
    - Uploaded By
        - This column will display the username of the User who uploaded the document.
            - Format: Last Name, First Name
        - This will be a system generated value and will be non-editable.

Feature Updates: Sprint 17

Eligibility Verification Checklist Screen Cont.

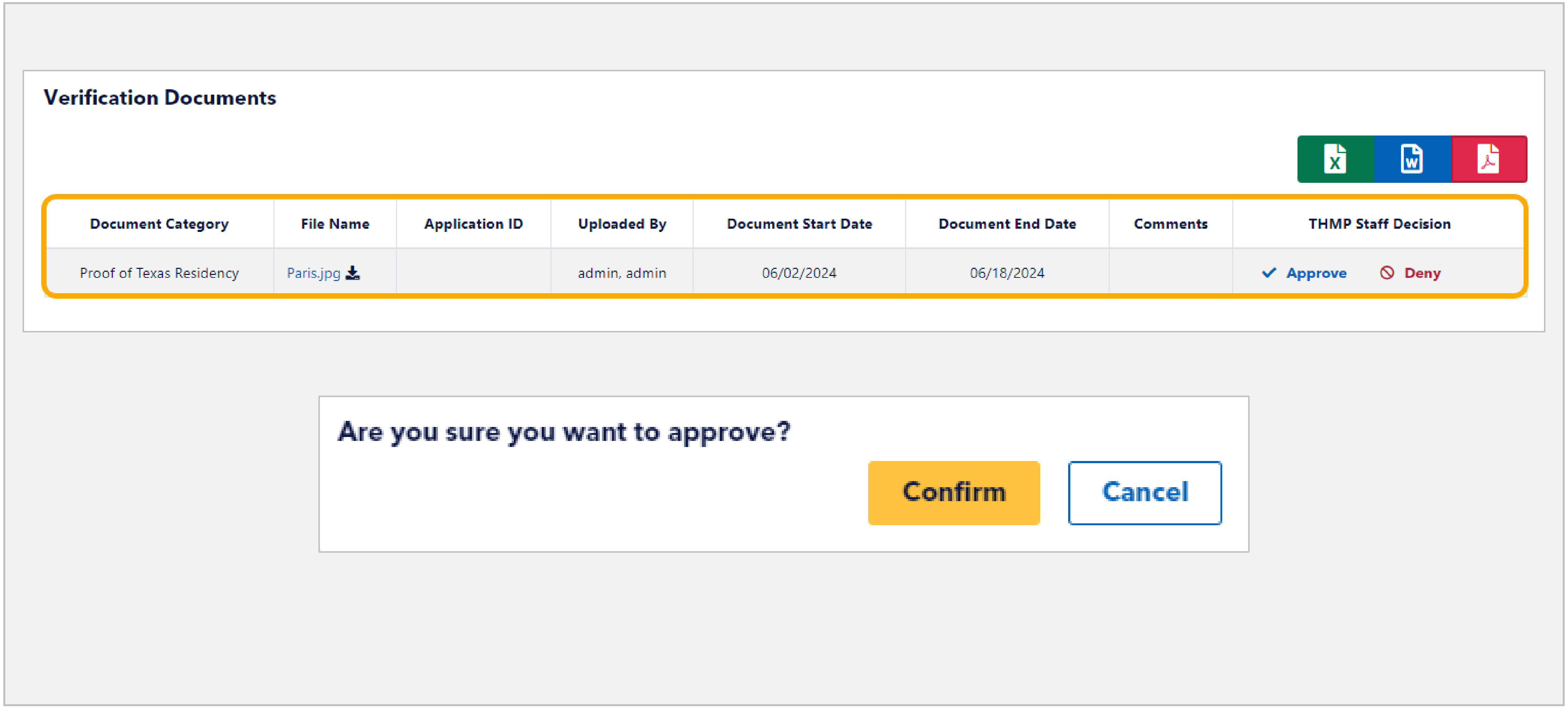
- Document Start Date
  - This column will display the Start Date value provided by the User when uploading the document.
    - Format: MM/DD/YYYY
  - This column will be blank if no Start Date was provided by the User.
    - Optional calendar field on the 'Upload Documents' pop up.
- Document End Date
  - This column will display the End Date value provided by the User when uploading the document.
    - Format: MM/DD/YYYY
  - This column will be blank if no End Date was provided by the User.
    - Optional calendar field on the 'Upload Documents' pop up.
- Comments
  - This column will display the comment values provided by the User when uploading the document.
  - This column will be blank if no Comments were provided by the User.
    - Optional free text field on the 'Upload Documents' pop up.
- THMP Staff Decision
  - This column will display two clickable buttons:
    - Approve
      - If the decision is approved by the THMP Staff Member, the below values will display:
        - Approved; Last Name, First Name; MM/DD/YYYY X:XX AM/PM
    - Deny
      - If the decision is denied by the THMP Staff Member, the below values will display:
        - Denied; Last Name, First Name; MM/DD/YYYY X:XX AM/PM

- The logic of the Documents Verification section will be as follows:
  - This section will be updated in real time each time a User uploads any documentation for the Client via any of the below screens:
    - Upload Documents screen (from the Client Dashboard)
    - Upload Documents screen (part of the Eligibility process)
    - Upload Documents screen (part of the application process)

  - Any documents uploaded on the Verification Checklist screen will not be synced to any other screen of the Portal. Documents uploaded on the Verification Checklist screen will remain on this screen ONLY. This screen will update in real time for the eligibility decisions and documents uploaded.

Feature Updates: Sprint 17

Eligibility Verification Checklist Screen Cont.



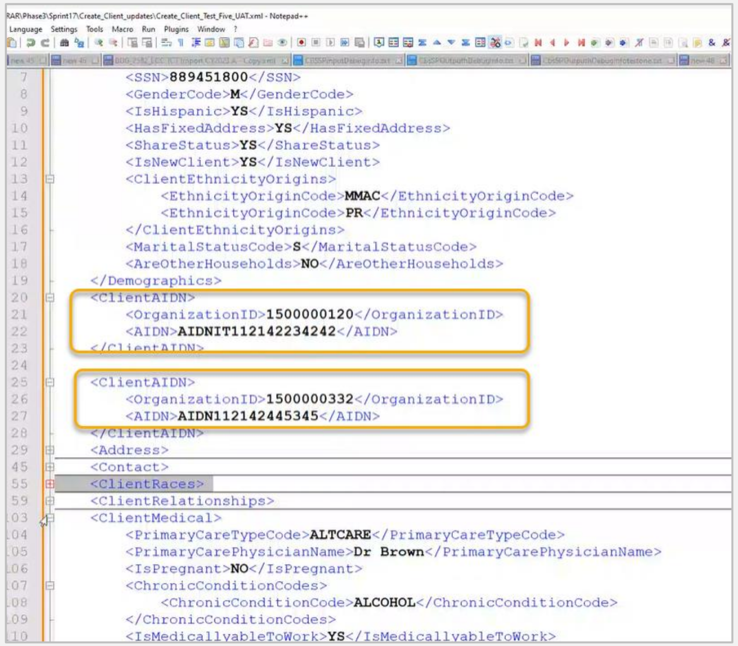
Document Category	File Name	Application ID	Uploaded By	Document Start Date	Document End Date	Comments	THMP Staff Decision
Proof of Texas Residency	Paris.jpg		admin, admin	06/02/2024	06/18/2024		Approve Deny

Feature Updates: Sprint 17

Interfaces Create Client Import Changes with Multiple AIDNs

When a TCT User attempts to create a client using the Create Client Import XML Batch File, the following enhancements will occur:

- <u>Pre-Condition:</u>
  - An Organization ID and AIDN ID must be entered into the Create Client XML Batch File for a successful import, so the Client is properly created in the TCT system.
- The User will now have the capability to include multiple organizations and multiple AIDNs when curating and importing the Create Client XML Batch File.
  - This enhancement will now accommodate both unique and different AIDNs and can be duplicated/repeated based on the below scenarios.



Same AIDNs	
Org ID	**AIDN**
Org 1	1156565656
Org 2	1156565656
Org 3	1156565656
Org 4	1156565656

Different AIDNs	
Org ID	**AIDN**
Org 1	1156457477
Org 2	1156564566
Org 3	1156562345
Org 4	1153453455

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