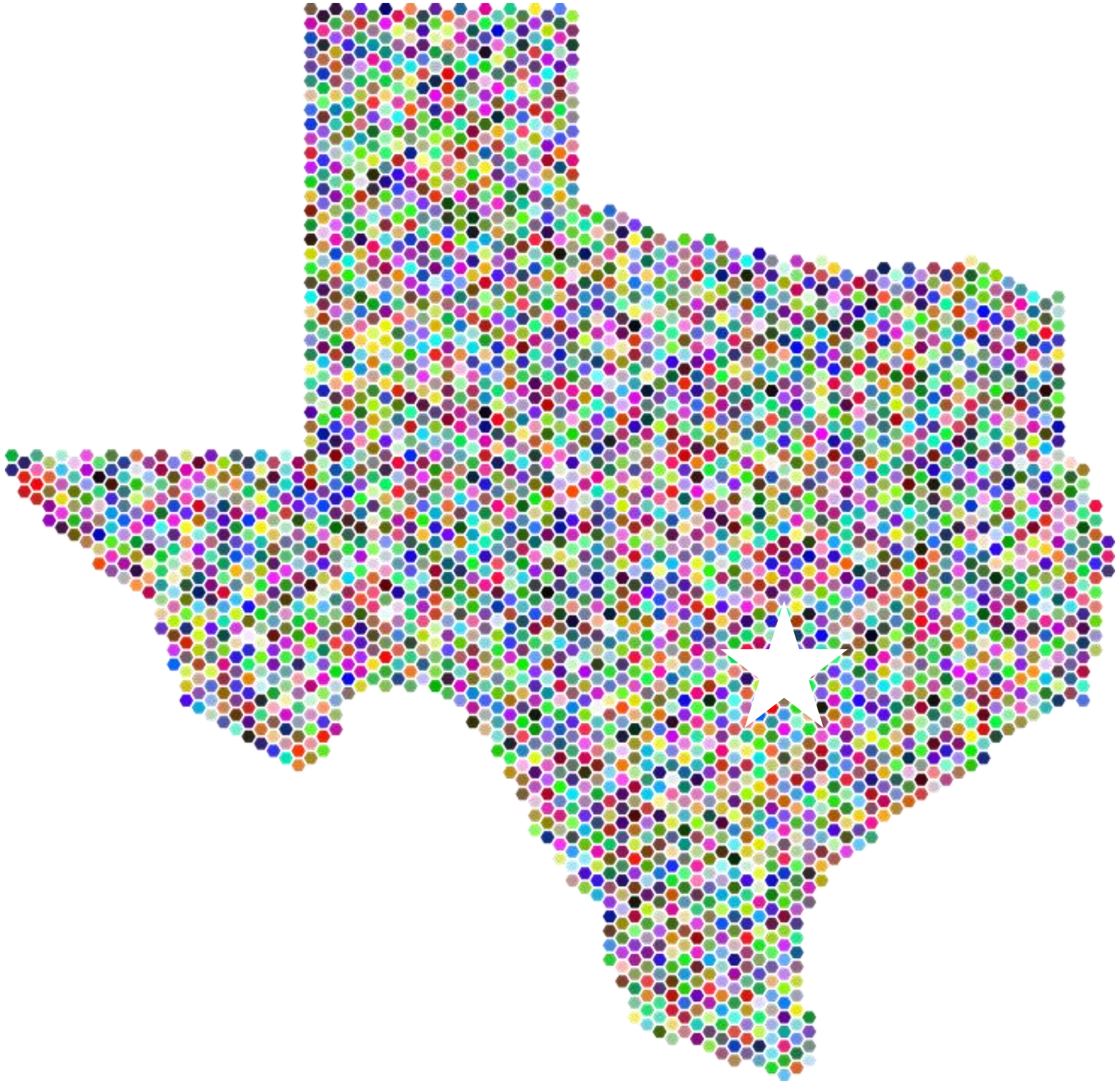
Take Charge Texas (TCT)
User Engagement Session

August 8th, 2024



Meet the Facilitators

DSHS/HHSC TEAM

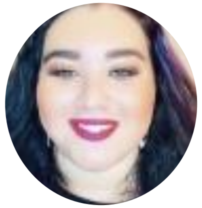
Charletha Joseph
Program Support

Rachel Sanor
HIV Care and Medications Unit Director

Christine Salinas
ADAP Regional Manager

Janina Vazquez
HIV Care Services Group Manager

Holly Benavides
TCT Help Desk Program Specialist



Ethel Garcia
Medication Data and Analysis Group Manager

Sylvia Jimenez
THMP Group Manager

DELOITTE TEAM

Nikki Fernandes
Project Manager

Meeta Sharma
Test Lead

Krishna Dixit
Team Lead/Scrum Master

Alex Davis
Consultant/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 Enhancement 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.

SPRINT 18

Focused on identifying deactivated pharmacies on the Worker Portal Order and Review Order screens, as well as enhanced features on the Order Conflicts screen to mandate justifications for medication record(s) selected for override. Implemented the ability to update clients' pre-existing address, income, and/or insurance information via the Update Client data elements found on the Create Client XML. Implemented the ability to change a client's status from Inactive to Active.

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

Sprint 18
- Pap Smear Test Result Enhancement
- Failed Orders Email Recipient Enhancement
- Adding ART Drugs to HIV Medication Information Screen
- Adding Pharmacy Code Search Field to User Scope Assignment Screen
- Worker Portal Order and Review Order Pharmacy Deactivation Enhancements
- Submitting Order Conflict Enhancements
- Reactivating Inactive Clients Enhancement
- STAR Report Funding Source Enhancement
- WICY Report Funding Source Enhancements
- Active User and Role Report Enhancements
- Adding Prescription Notes to Drug Regimen Screen
- Eligibility History Detail Enhancements
- Addition of Updates to Change Request and/or Self-Attestation Applications on Task Board
- Improving Batch Import Files – Services, Medical, Update Client, and Create Client
- Update Client XML Enhancement

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 19.

Jan ‘24

We are here

Sprint 19

Jan ‘25

Focusing on improving the Staff Activity Audit Report to identify change(s) made to a Client’s profile, so Users can be re-directed to the specific screen(s) in which update(s) were made in the TCT System. Developing the Universal Service Utilization Report to export Clients’ services and medical information for internal and HRSA reporting. Enabling the ability for THMP Admin and ADAP Order Processor users to manually flag Open(Started) and Open(Empty) orders to ‘Closed(Empty)’. Enhancing the Manual Holds screen by developing system logic to automatically remove Recert/Self-Attestation holds after an eligibility decision has been made. Introducing new eligibility rules to determine the eligibility outcome for HIV information captured via the Application Workflow/Client’s Profile.

- Notification Center: Select All Enhancement
- Notification Center: Expiration Enhancement
- Client & Agency Portal: Save and Exit Application Enhancement
- Agency Portal Login Screen Enhancement
- Modifications to Household Detail Input Requirements
- Resolving Open(Started) and Open(Empty) Medication Orders on the Orders Screen
- Addition of Pharmacy Information on the Orders screen
- Drug Regimen and Case Notes Real Time Synchronization
- Task Board Bulk Edit Enhancements
- Hold Screen Enhancements
- Expanding Parameters of the Staff Activity Audit Report
- Universal Service Utilization Report
- Contracts: Edit Budget Amount on Contract Subservice Screen
- Display Application ID on the Application History Screen
- Updating Eligibility Rules for HIV Diagnosis

System Overview: New TCT Features

Live Demonstration of TCT Features

TCT Features Video Presentation

- Pap Smear Test Result Enhancement
- Failed Orders Email Recipient Enhancement
- Adding ART Drugs to HIV Medication Information Screen
- Adding Pharmacy Code Search Field to User Scope Assignment Screen
- Worker Portal Order and Review Order Pharmacy Deactivation Enhancements
- Submitting Order Conflict Enhancements
- Reactivating Inactive Clients Enhancement
- STAR Report Funding Source Enhancement
- WICY Report Funding Source Enhancements
- Active User and Role Report Enhancements
- Adding Prescription Notes to Drug Regimen Screen
- Eligibility History Detail Enhancements
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- Update Client XML Enhancement

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.

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?

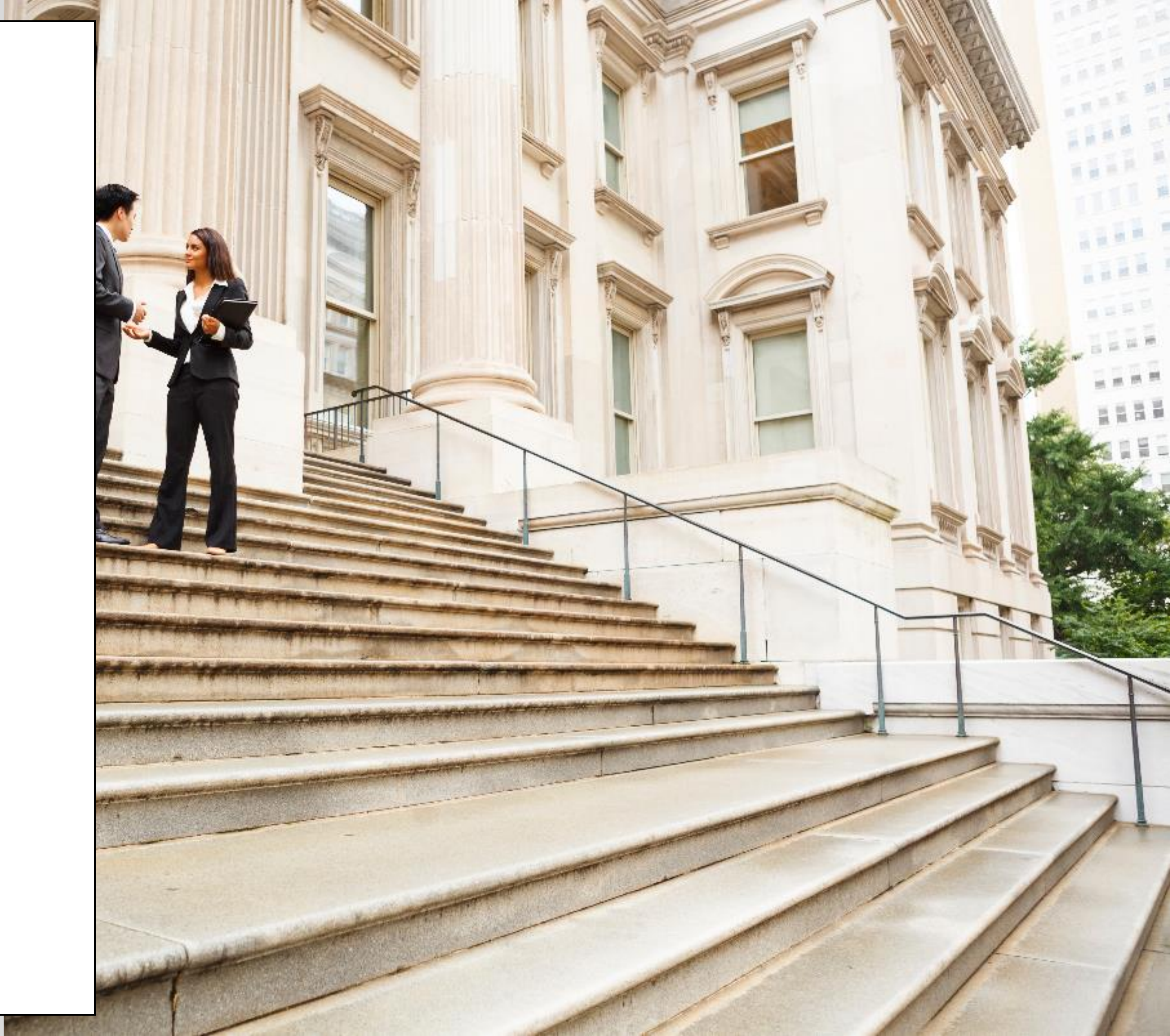
The **TakeChargeTexas Portal**, is a system with a goal to benefit all end users – providers, admins and clients. To achieve future growth and scale, **we request you to provide your suggestions and feedback.**

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!

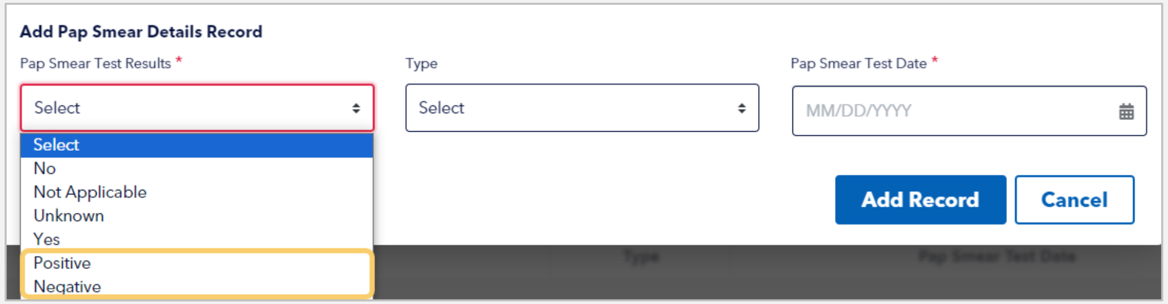
System Overview: New TCT Features

Feature Updates: Sprint 18

Agency Portal Client Pages Pap Smear Test Result Enhancements

When a TCT User navigates to a client's profile and clicks on the 'Medical' drop down and selects the 'Pap Smears' hyperlink, the following enhancements will occur:

- The below new options/picklist values will display under the mandatory 'Pap Smear Test Results' single-select drop down on the 'Add Pap Smear Details Record' pop up:
  - Positive
  - Negative
- The XSD for Medical import will be updated to accommodate the above new options/picklist values.

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<xs:enumeration value="PSNEG"/>
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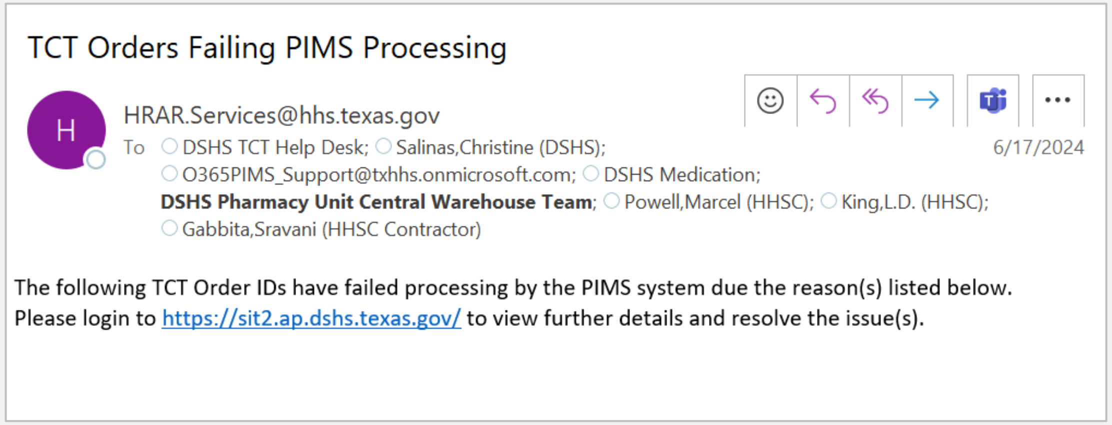
Feature Updates: Sprint 18

Pharmacy Failed Orders Email Recipient Enhancement

When a medication order is sent from the TCT system to PIMS, and the order fails, an email is sent to a select group of individuals informing them of the error.

- With this enhancement, the failed order email will now be sent to the below email addresses:
  - **TCT Help Desk:** tcthelpdesk@dshs.texas.gov
  - **THMP:** Christine.Salinas@dshs.texas.gov
  - **Pharmacy:** O365-PIMS_Support@txhhs.onmicrosoft.com
  - **Medications:** medication@dshs.texas.gov
  - **DSHS Pharmacy Unit Central Warehouse Team:** DSHSPharmacyUnitCentralWarehouseTeam@txhhs.onmicrosoft.com
  - **Public Health Service Application:** marcel.powell@hhs.texas.gov and l.d.king@hhs.texas.gov


TCT Orders Failing PIMS Processing

HRAR.Services@hhs.texas.gov

To DSHS TCT Help Desk; Salinas,Christine (DSHS); O365PIMS_Support@txhhs.onmicrosoft.com; DSHS Medication; **DSHS Pharmacy Unit Central Warehouse Team**; Powell,Marcel (HHSC); King,L.D. (HHSC); Gabbita,Sravani (HHSC Contractor)

6/17/2024

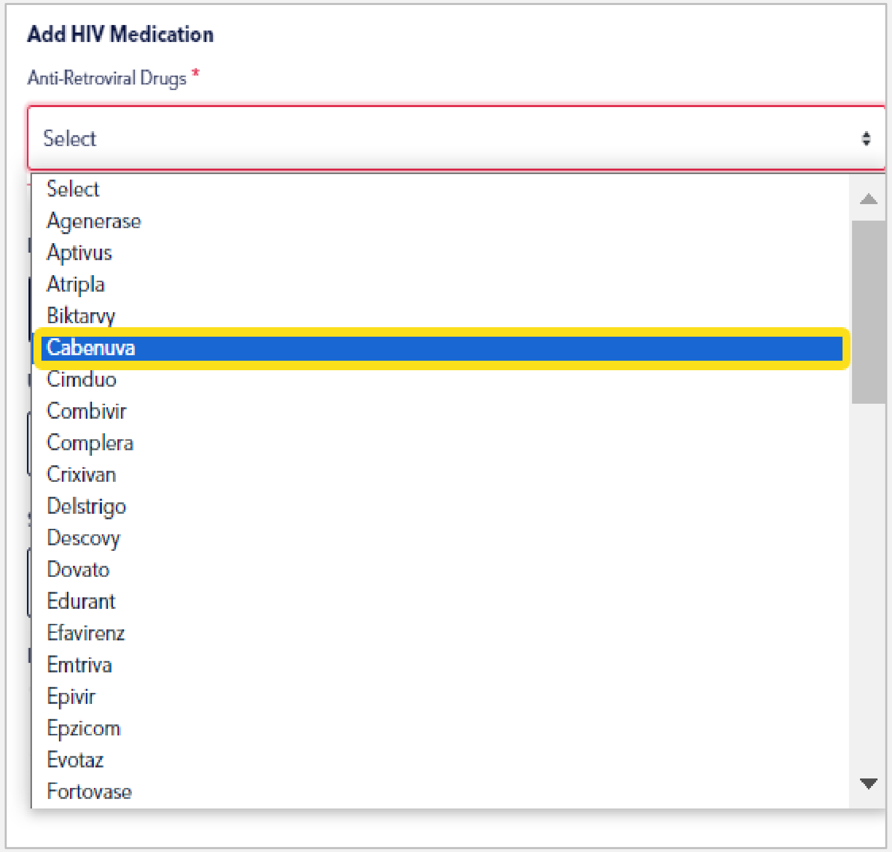
The following TCT Order IDs have failed processing by the PIMS system due the reason(s) listed below.
Please login to https://sit2.ap.dshs.texas.gov/ to view further details and resolve the issue(s).

Feature Updates: Sprint 18

Pharmacy Adding ART drugs to HIV Medication Information Screen

When a TCT User navigates to a client's profile and clicks on the 'Medical' drop down and selects the 'HIV Medication Info' hyperlink, the following enhancements will occur:

- The below new options/picklist values will now display, in alphabetical order, under the mandatory 'Anti-Retroviral Drugs' single-select drop down on the 'Add HIV Medication' pop up:
  - Cabenuva
  - Sunlenca
  - Trogarzo
  - Symfi
  - Symfi Lo
  - Vocabria
  - Vemlidy
  - Efavirenz



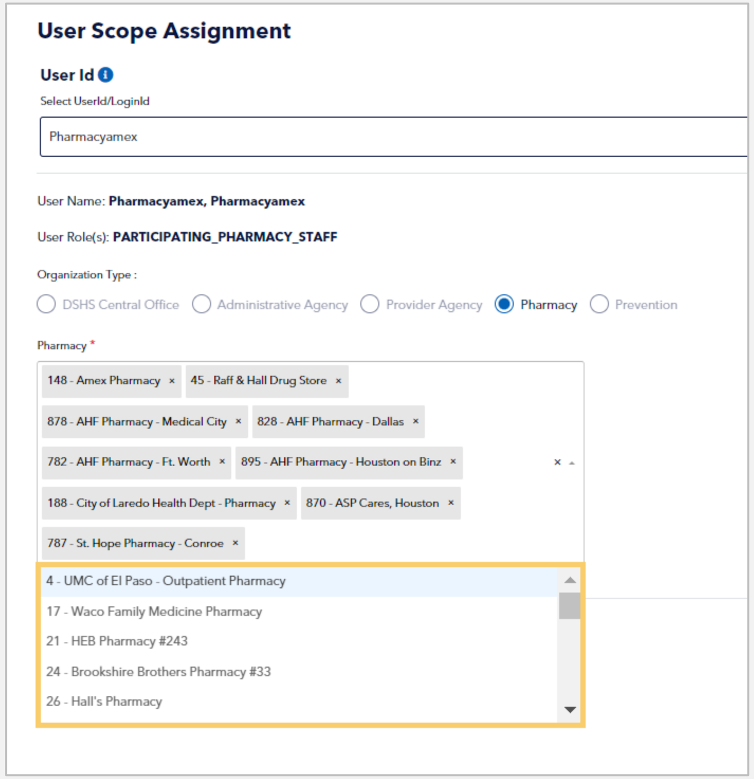
Feature Updates: Sprint 18

Pharmacy Adding Pharmacy Code Search Field to User Scope Assignment Screen

When a TCT Admin User navigates to the User Scope Assignment screen via the 'Admin' tile, the following enhancements will occur:

The mandatory 'Pharmacy' multi-select search field will now include the **Pharmacy Code(s)** for new and existing assigned pharmacy(ies).

- When an Admin User initiates a search for a particular pharmacy, the below format will now display/populate:
  - i.e., 243 – Kroger Pharmacy
    - *Pharmacy Code + Pharmacy Name*
- For existing, pre-assigned pharmacy(ies), the format will be updated to include the Pharmacy Code(s) in conjunction with the Pharmacy Name(s).



Feature Updates: Sprint 18

Pharmacy Worker Portal Order and Review Order Screen Enhancements

When a TCT Admin User navigates to the Worker Portal Order and Review Order screens, the following enhancements will occur:

Worker Portal Order Screen

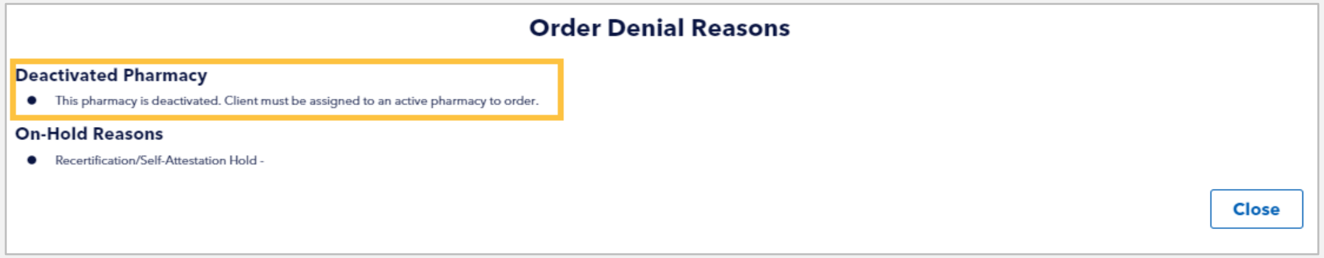
- With this enhancement, both Active and Deactivated pharmacy(ies) will now appear in the results table.
- A red Help Text hyperlink, titled 'Order Denial Reasons', will now appear under the 'Select' column and will be viewable and clickable for deactivated pharmacies.
    - When the User clicks on the 'Order Denial Reasons' Help Text hyperlink, a validation message pop up will display.
        - Header: Order Denial Reasons
        - Sub Header: Deactivated Pharmacy
            - *Additional sub headers will display if the pharmacy has more than one denial reason.*
            - *Medication ordering will be restricted for deactivated pharmacies.*
        - Message: "This pharmacy is deactivated. Client must be assigned to an active pharmacy to order."
        - The validation message will include a 'Close' button that the User must click on to close out of the message.

Review Order Screen

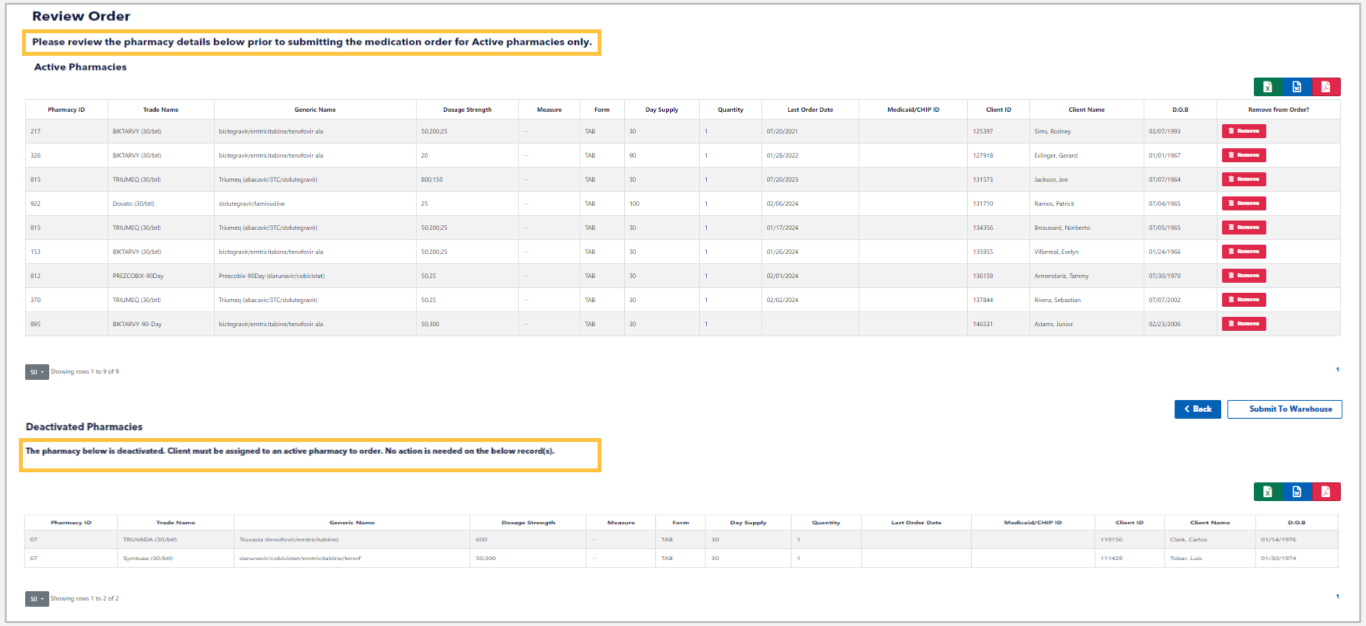
- In the event a pharmacy becomes deactivated after the User has created the order, the following will occur on the Review Order screen.
    - The Review Order screen will now display separate results tables for Active versus Deactivated pharmacy(ies).
        - The below text will display under the 'Review Order' title: "Please review the pharmacy details below prior to submitting the medication order for Active pharmacies only."
            - Active Pharmacies
                - The results table will continue to display the existing Review Order column headers and system generated values.
                    - *Medication ordering will be enabled for Active pharmacies only.*
            - Deactivated Pharmacies
                - The below text will display under the 'Deactivated Pharmacies' title: "The pharmacy below is deactivated. Client must be assigned to an active pharmacy to order. No action is needed on the below record(s)."
                - The results table will continue to display the existing Review Order column headers and system generated values except for the 'Remove from Order?' column which will be removed as no action is required for deactivated pharmacy(ies).
                    - *Medication ordering will be restricted for Deactivated pharmacies.*

Feature Updates: Sprint 18

Pharmacy Worker Portal Order and Review Order Screen Enhancements Cont.



Worker Portal Order Screen



Review Order Screen

Feature Updates: Sprint 18

Pharmacy Submitting Order Conflict Enhancements

When a TCT User navigates to the Order Conflicts screen for medication order(s) requiring override, the following enhancements will occur:

- A new column will be added to the right of the pre-existing ‘Actions’ column, titled:
  - Select
    - This column will include a check box(es) for the medication(s) flagged as requiring override.
    - The User must take action to select all or individual medication record(s) to proceed with ordering.

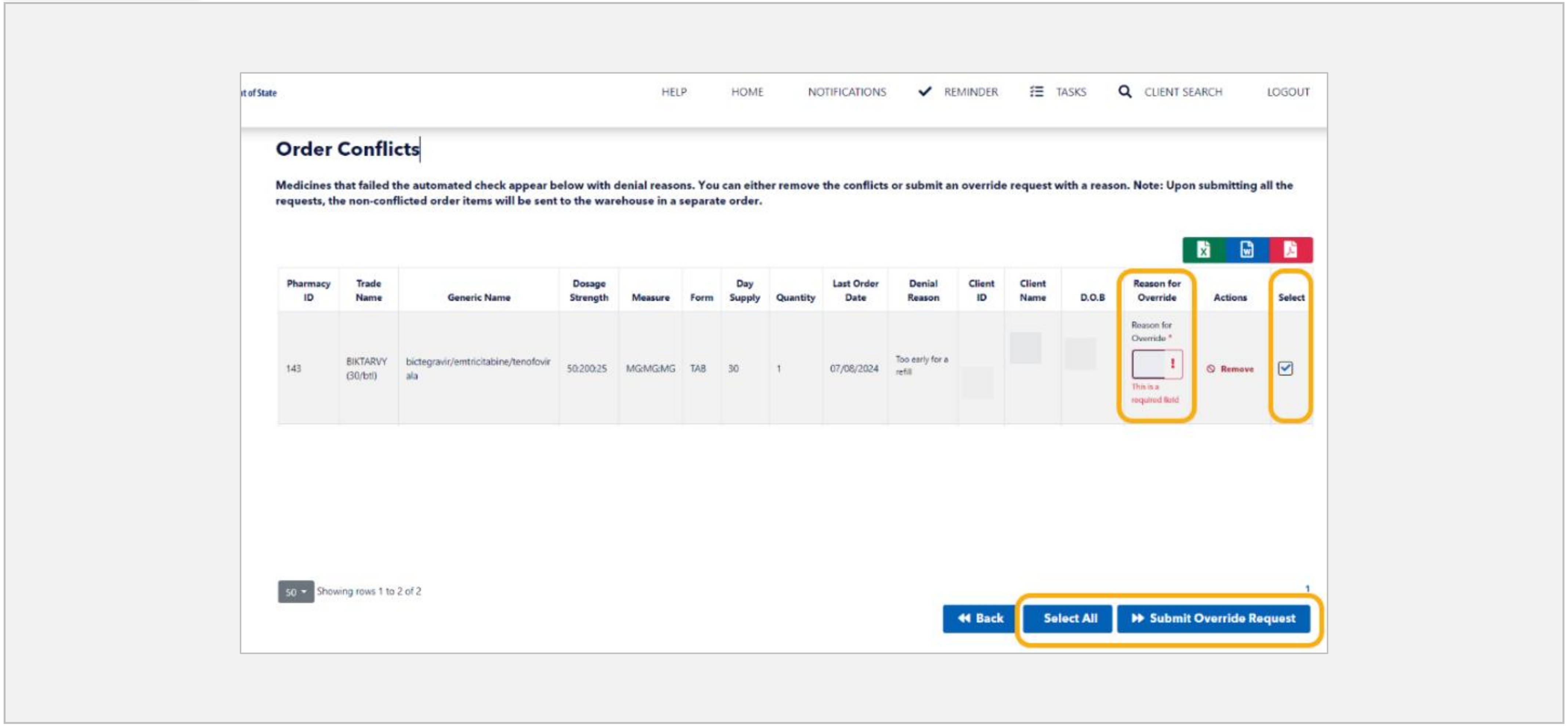
- A new ‘Select All’ button will appear to the right of the existing ‘Back’ button near the bottom-right of the screen.
  - This will allow the User to select all override medication record(s) without having to manually check box each record.

- A new ‘Submit Override Request’ button will appear to the right of the new ‘Select All’ button near the bottom-right of the screen.
  - This will allow the User to select one over-arching button to submit the override medication record(s) after making the check box selection(s) on the Order Conflicts screen.
    - This feature will work whether one or all medication record(s) is/are selected by the User.
    - This feature will replace the pre-existing ‘Submit Override Request’ action found under the ‘Actions’ column for each individual override medication record.

- The ‘Reason for Override’ column will now be mandatory/required for medication record(s) selected under the new ‘Select’ column.
  - Text must be entered into the free text field(s) if the override medication record(s) is selected on the Order Conflicts screen.
  - If the User selects the override record(s) but does not enter a justification, the following message will display: “This is a required field”

Feature Updates: Sprint 18

Pharmacy Submitting Order Conflict Enhancements Cont.



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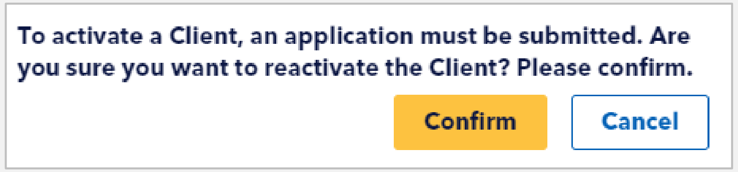
Feature Updates: Sprint 18

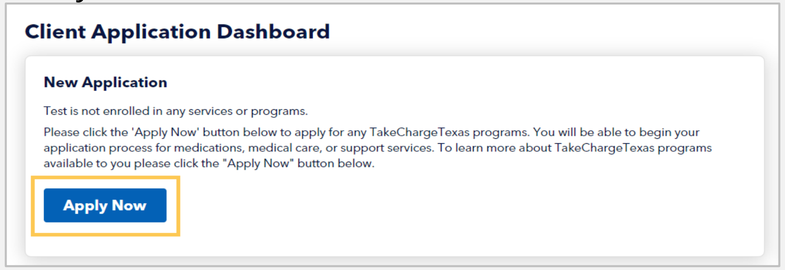
Agency Portal Client Pages Reactivating Inactive Clients

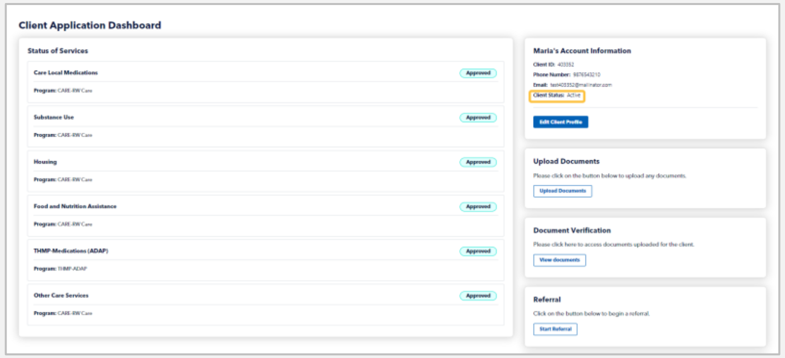
When an HRAR Admin User attempts to update a client's status from Inactive to Active, the following enhancements will occur:

- The below validation message pop up will now display when an Admin User attempts to change and save a client's profile from Inactive to Active via the 'Is Client Active?' single-select drop down on the Client Details screen.
  - The validation message pop up will state the following: "To activate a Client, an application must be submitted. Are you sure you want to reactivate the Client? Please confirm."
    - *The ability to update the status of a client profile is permitted to HRAR Admin Users only.*
  - The User must acknowledge the pop up by clicking one of the buttons below:
    - Confirm
    - Cancel



- By an HRAR Admin User updating the client's profile from Inactive to Active, the Client Dashboard will then display the '**Apply Now**' button which will be clickable to the User to initiate a New Application for the client. Once the New Application is submitted, the 'Client Status' will then update from 'Inactive' to 'Active'.
  - Once the New Application has had a decision made, any previous eligibility transaction(s) will then be removed from the Client Dashboard.
- HRAR Admins will <u>not</u> be able to update/flag deceased clients to 'Active' as the profiles should remain Inactive in the TCT system.





^This is the view when a client has been flagged as 'Active' and has submitted a New Application for which eligibility was processed.

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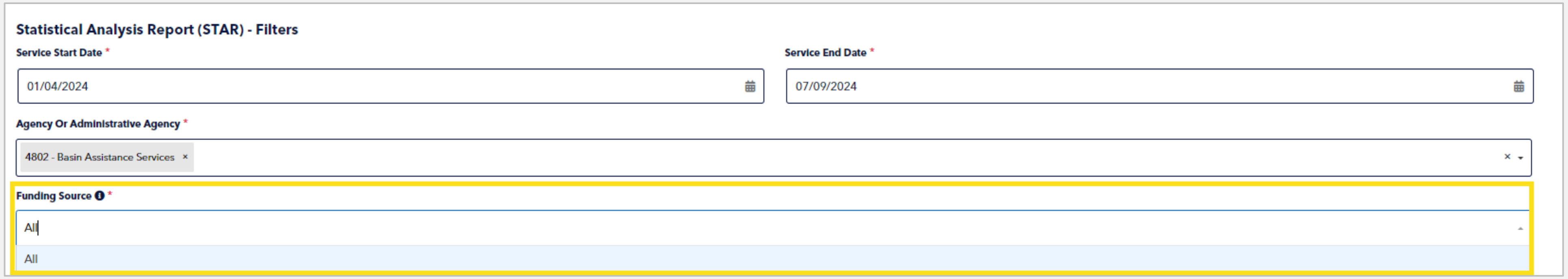
Feature Updates: Sprint 18

Reports STAR Report Funding Source Enhancement

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

- The STAR Report will now display the ‘All’ option/picklist value under the ‘Funding Source’ search field when curating the report.
  - The funding source value(s) will populate based on the Agency(ies) selected by the User.
    - Once the ‘All’ option/picklist value is selected, the applicable funding sources will then display in the ‘Funding Source’ field.



Statistical Analysis Report (STAR) - Filters

Service Start Date *

01/04/2024

Service End Date *

07/09/2024

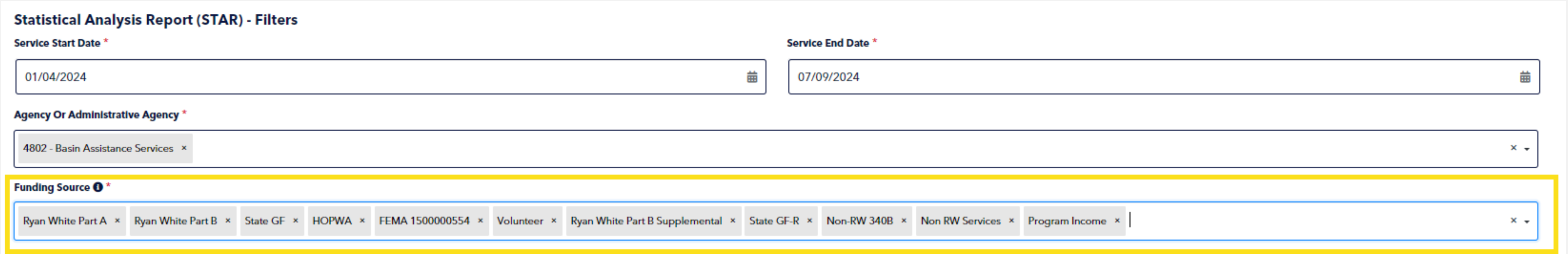
Agency Or Administrative Agency *

4802 - Basin Assistance Services ×

Funding Source *

All

All



Statistical Analysis Report (STAR) - Filters

Service Start Date *

01/04/2024

Service End Date *

07/09/2024

Agency Or Administrative Agency *

4802 - Basin Assistance Services ×

Funding Source *

Ryan White Part A × Ryan White Part B × State GF × HOPWA × FEMA 1500000554 × Volunteer × Ryan White Part B Supplemental × State GF-R × Non-RW 340B × Non RW Services × Program Income ×

Feature Updates: Sprint 18

Reports WICY Report: Addition of Funding Source Enhancements

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

The WICY Report screen will now display an additional search field:

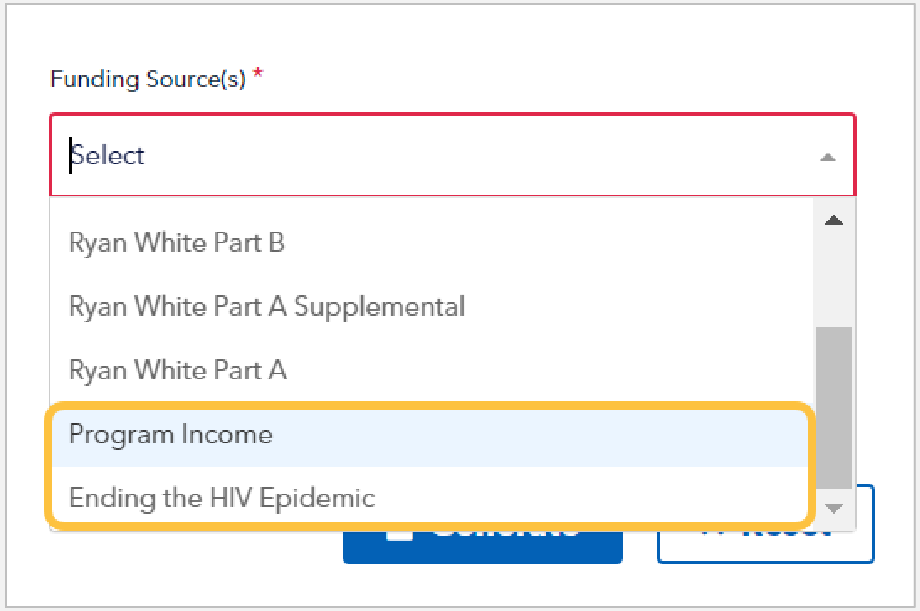
- Agency
  - This will be an optional, multi-select drop down of all active Provider and Admin Agency(ies).
  - The ‘Agency’ drop down will include an ‘All’ option/picklist value.
    - When a User selects the ‘All’ option, all agencies in the drop down will display as selected in the ‘Agency’ search field.
  - When an HRAR Admin User is curating the report, all Provider and Admin Agencies will display in the ‘Agency’ drop down.
    - When an HRAR Admin User selects an Admin Agency, they will not be able to select a Provider Agency within that Admin Agency to prevent duplicate data.
  - When an AA Data Manager is curating the report, only Provider Agency(ies) will display for which the User is associated to.

Feature Updates: Sprint 18

Reports WICY Report Enhancements Cont.

- The WICY Report will now include the additional funding source(s) via the 'Funding Source(s)' multi-select drop down:
    - Program Income
    - Ending HIV Epidemic (EHE)

- When a User selects the 'Program Income' and/or 'Ending the HIV Epidemic (EHE)' funding source(s) via the 'Funding Source(s)' search field and proceeds with generating the report, the report output will only render results as applicable to the Program Income and/or Ending the HIV Epidemic (EHE) funding source(s).
    - Pre-Condition: A client must have a Client Services record with the 'Program Income' and/or 'Ending HIV Epidemic (EHE)' funding source(s) indicated for the client to appear in the report export.



Feature Updates: Sprint 18

Reports WICY Report Enhancements Cont.

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

THMP TakeChargeTexas

Generated On :7/16/2024

WICY Report

Service Start Date: 1/4/2024

Service End Date: 7/16/2024

Funding Source: Program Income,Ending the HIV Epidemic

Agency: 4800 - Texas Department of State Health Services

Total WICY Expenditure: $0

	Gender					Ethnicity/Race								
Primary Service	**Male**	**Female**	**Intersex**	**Other**	**Unknown/ Unreported Gender**	**American Indian / Alaska**	**Asian**	**Black/ African American**	**Native Hawaiian**	**White**	**More Than One**	**Unknown/ Unreported Race**	**Total Number of Clients**	**Total Expenditure**
Infants(0-1)														
Total	0	0	0	0	0	0	0	0	0	0	0	0	0	$0
Children (2-12)														
Total	0	0	0	0	0	0	0	0	0	0	0	0	0	$0
Youth(13-24)														
Total	0	0	0	0	0	0	0	0	0	0	0	0	0	$0

^Above is an example of the WICY report output with the 'All' option/picklist value selected for the 'Agency' drop down and the 'Program Income' and 'Ending the HIV Epidemic (EHE)' funding sources selected for the 'Funding Source(s)' drop down.

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Feature Updates: Sprint 18

Reports Active User and Role Report Enhancements

When a TCT User navigates to the Active User and Role Report found under the 'Accessible Reports' drop down via the 'Reports' tile, the following enhancements will occur:

The following user roles will have access to the Active User and Role Report:

- HRAR Admin
- DSHS Program Staff
- AA Data Manager
- Agency Client Services Supervisor / Manager

- The 'Active User and Role Report' will now display the following search criteria:
  - Agency
    - Optional, single-select drop down.
    - This search field will display the options/picklist values of all active Provider and Admin Agencies in the TCT system.
    - This search field will have the option/picklist value of 4800 - Texas Department of State Health Services.
      - *The 4800 – Texas Department of State Health Services option/picklist value will only be available to HRAR Admin and DSHS Program Staff Users only.*
    - When an Agency Client Services Supervisor / Manager User is curating the report, the 'Agency' drop down search field will only render Provider Agency(ies) associated to the User.
    - When an AA Data Manager User is curating the report, the 'Agency' drop down search field will only render Provider Agencies associated to User.
    - When a HRAR Admin or DSHS Program Staff User is curating the report, the 'Agency' drop down search field will render all the active Provider & Admin Agencies.

Feature Updates: Sprint 18

Reports Active User and Role Report Enhancements Cont.

- User Role
  - Optional, multi-select drop down.
  - This search field will display the user role options/picklist values available for selection which is applicable to the User logging in based on their user type.
  - The ‘User Role’ multi-select drop down will include an ‘All’ option/picklist value.
  - When an AA Data Manager User logs in, they will be able to select the below user roles based on their role permissions:
    - AA Fiscal Staff
    - AA Program Staff
    - AA Read Only
    - Agency Admin Staff
    - Agency Client Services Staff
    - Agency Client Services Supervisor / Manager
    - Agency Medical Providers
    - HOPWA Case Manager
  - When an Agency Client Services Supervisor / Manager User logs in, they will be able to select the below user roles based on their role permissions:
    - Agency Admin Staff
    - Agency Client Services Staff
    - Agency Client Services Supervisor / Manager
    - Agency Medical Providers
    - HOPWA Case Manager
  - When a HRAR Admin or DSHS Program Staff User logs in, they will be able to select all user roles in the TCT system based on their role permissions.

Feature Updates: Sprint 18

Reports Active User and Role Report Enhancements Cont.

- User First Name
    - Optional, free text field.
    - Maximum character limit of 25.
    - Accepts alphabetical values only.
- User Last Name
    - Optional, free text field.
    - Maximum character limit of 25.
    - Accepts alphabetical values only.
- Login ID
    - Optional, free text field.
    - Accepts alpha-numeric values.
- Start Date
    - Mandatory, calendar field.
        - Format: MM/DD/YYYY.
- End Date
    - Mandatory, calendar field.
        - Format: MM/DD/YYYY.
    - The End Date cannot be before the ‘Start Date’.

Feature Updates: Sprint 18

Reports Active User and Role Report Enhancements Cont.

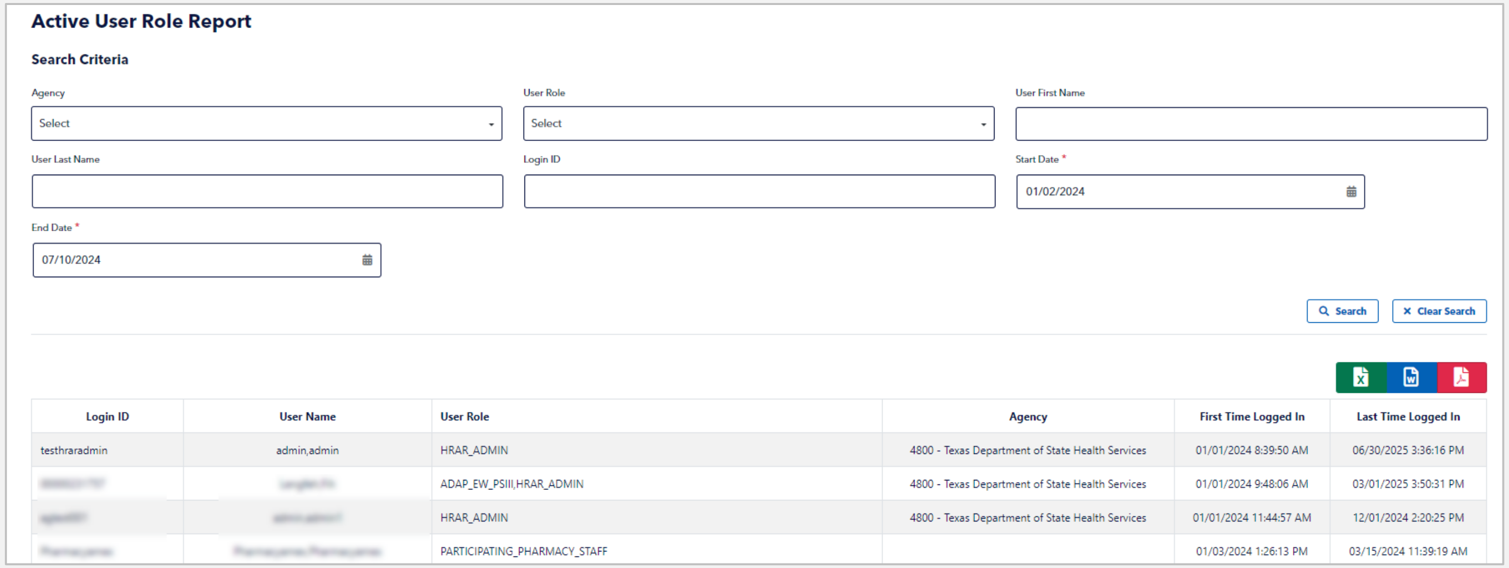
- The logic for the date range is as follows:
  - There will be a 90-day window between the ‘Start Date’ and ‘End Date’ search fields.
    - If the date range selected for ‘Start Date’ and ‘End Date’ falls outside of the 90-day window, the below message will display:
      - “The date range you entered is larger than 90 days. Please enter a date range that is 90 days or less.”

- When a User enters/selects the search criteria fields, and clicks on the ‘Search’ button, the results table will display the below columns and system generated values:
  - Login ID
    - This column will display the User ID / Login ID.
  - User Name
    - This column will display the User’s Username.
  - User Role
    - This column will display the User’s User Role.
  - Agency
    - This column will display the User’s Agency.
    - If the User is associated to DSHS Central Office on the User Scope Assignment screen, the column value will display as ‘4800 – Texas Department of State Health Services’.
  - First Time Logged In
    - This column will display the first time the particular User logged in to the TCT Portal with the associated User Role.
      - Date Format: MM/DD/YYYY.
      - Timestamp Format: HH:MM:SS AM/PM.
  - Last Time Logged In
    - This column will display the last time the particular User logged in to the TCT Portal with the associated User Role.
      - Date Format: MM/DD/YYYY.
      - Timestamp Format: HH:MM:SS AM/PM.

Feature Updates: Sprint 18

Reports Active User and Role Report Enhancements Cont.

- If the User's search combination is invalid, the below message will display on screen:
  - "This search is invalid. Please refine your search."
- The below columns will be added to the Active User and Role Report results table:
  - Login ID
  - Agency
- The below column will be updated from 'Role' to 'User Role' on the Active User and Role Report results table.
  - User Role



Login ID	User Name	User Role	Agency	First Time Logged In	Last Time Logged In
testhraradmin	admin,admin	HRAR_ADMIN	4800 - Texas Department of State Health Services	01/01/2024 8:39:50 AM	06/30/2025 3:36:16 PM
[illegible]	[illegible]	ADAP_EW_PSIII,HRAR_ADMIN	4800 - Texas Department of State Health Services	01/01/2024 9:48:06 AM	03/01/2025 3:50:31 PM
[illegible]	[illegible]	HRAR_ADMIN	4800 - Texas Department of State Health Services	01/01/2024 11:44:57 AM	12/01/2024 2:20:25 PM
[illegible]	[illegible]	PARTICIPATING_PHARMACY_STAFF		01/03/2024 1:26:13 PM	03/15/2024 11:39:19 AM

Feature Updates: Sprint 18

Pharmacy Drug Regimen Notes

When a TCT User navigates to a client's profile and clicks the 'Pharmacy' drop down and selects the 'Drug Regimen' hyperlink, the following enhancements will occur:

- There will be a new notes section beneath the current 'Prescribed Drugs' results table titled 'Prescription Notes'.
  - The 'Prescription Notes' section will be enabled to the below user roles so key information can be added to the client's prescription medication(s).
    - Any User who has Read/Write access to the client's Drug Regimen screen will have the ability to add a Prescription Note via the section/results table.

- Beneath the 'Prescription Notes' title, there will be a sub header titled 'Add a Note'.
  - The 'Add a Note' sub header will include Help Text stating the following: "This note action will not change the client's assigned pharmacy via the Assign/Change Pharmacy screen."
  - The 'Add a Note' sub header will have the following optional, single-select drop down.
    - Select Note Category
      - The following options/picklist values will be available for selection:
        - Pharmacy Site
        - Prescription Detail
        - Medication Status
        - Medication Drop Detail
        - Other
      - When a User first lands on the Drug Regimen screen, the 'Select Note Category' drop down field will be <u>optional</u> by default.
      - Only when a User selects a Note Category via the 'Select Note Category' drop down, will the field become <u>mandatory/required</u>.
        - If a User mistakenly selects a Note Category, the User can update their selection by selecting the 'Select' picklist value under the 'Select Note Category' drop down which will revert the field back to <u>optional</u> by default.
      - When a User <u>DOES NOT</u> select a Note Category via the picklist values above and tries to enter a note via the 'Note' free text field, the 'Add Notes' button will be disabled, preventing the User from saving the Prescription Note.
        - A Note Category must be selected to successfully save a Prescription Note.

Feature Updates: Sprint 18

Pharmacy Drug Regimen Notes Cont.

- Beneath the 'Add a Note' sub header and the 'Select Note Category' drop down, there will be an optional free text field titled 'Note'.
  - When a User first lands on the Drug Regimen screen, the 'Note' free text field will be optional by default.
  - Only when a User selects a Note Category via the 'Select Note Category' drop down, will the 'Note' free text field become mandatory/required.
  - If a User mistakenly selects a Note Category, the User can then update their selection by selecting the 'Select' picklist value under the 'Select Note Category' drop down which will revert the 'Note' free text field back to optional by default.
  - When a User DOES NOT enter a note via the 'Note' free text field, the 'Add Notes' button will be disabled, preventing the User from saving the Prescription Note.
    - A Note must be entered to successfully save a Prescription Note.
      - There will be an 8,000-character limit maximum.

- Beneath the 'Note' free text field, an 'Add Notes' action button will display.
  - The button will be enabled when both a Note Category is selected and a Note is entered.
  - The button will be disabled if no Note Category is selected and a Note is not entered.
  - The following logic will occur:
    - When a User first lands on the Drug Regimen screen, the 'Select Note Category' drop down and 'Note' free-text fields will be optional.
    - When a User selects a Note Category via the 'Select Note Category' drop down, both the 'Select Note Category' drop down and 'Note' free text fields will be mandatory/required.
    - If the User mistakenly selects a Note Category via the 'Select Note Category' drop down and re-selects the 'Select' option/picklist value, both the 'Select Note Category' drop down and 'Note' free text fields will be optional.

- Once a Note Category and Note has been selected, entered, and saved, the Prescription Note will then display in the table below titled 'All Notes'.
  - The table will display the following Prescription Note attributes.
    - The name of the User who added the Prescription Note(s).
      - Format: Last Name, First Name.
    - The Note Category selected.
    - The date and timestamp the Prescription Note was added.
      - Format: Date, Timestamp

- The Prescription Note record(s) will then populate in the 'Notes' results table under the 'All Notes' section once successfully saved on the Drug Regimen screen.
  - For example, Smith, John — Prescription Details — 5/23/2024, 11:22 AM.

Feature Updates: Sprint 18

Pharmacy Drug Regimen Notes Cont.

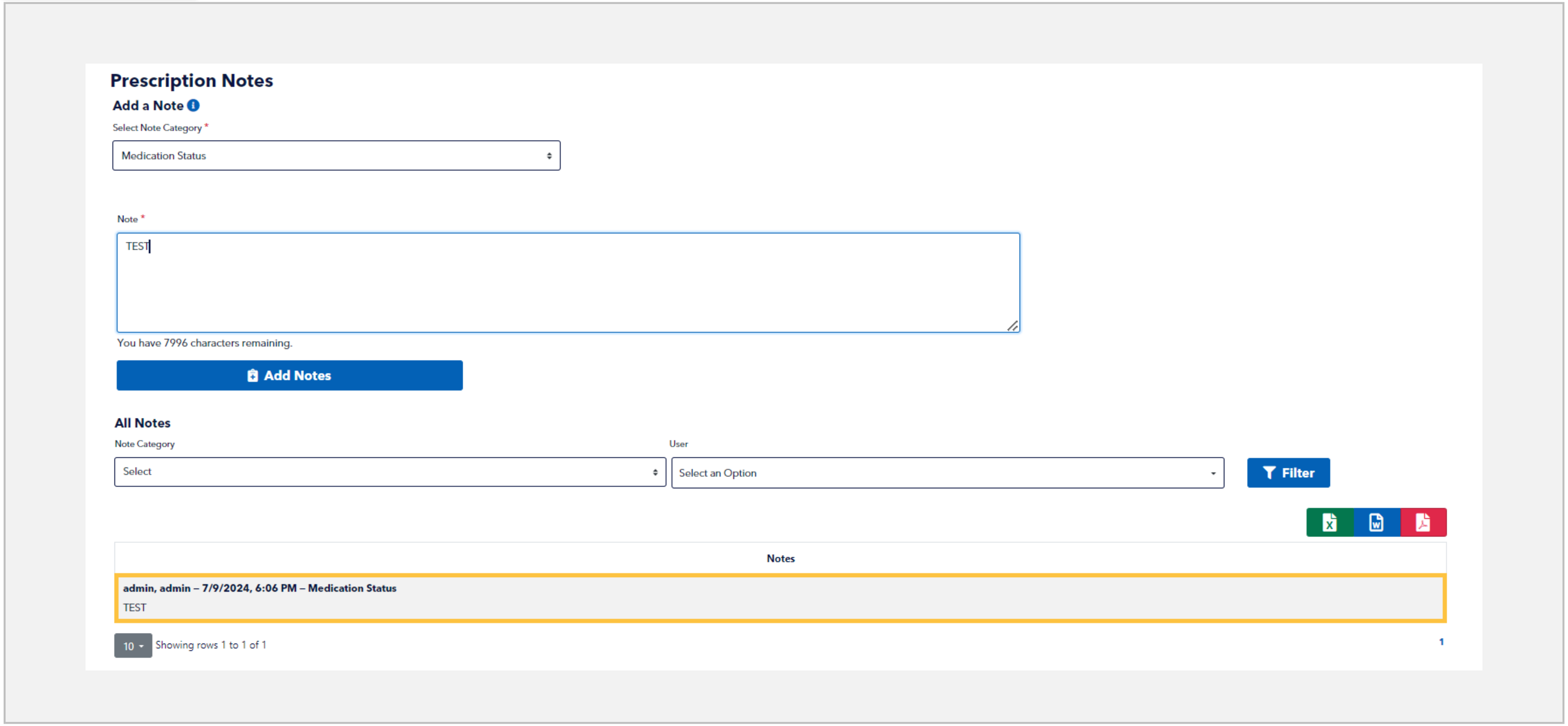
- The following search fields will be added to the ‘All Notes’ section:
  - Note Category
    - This will be a single-select drop down which can be filtered to display the Prescription Note(s) for the specific Note Category selected.
  - User
    - This will display the username of the User who added the Prescription Note.
      - Format: Last Name, First Name.
  - Filter
    - This will be a button the User can click on to filter their Prescription Notes results, once saved, after selecting their preferred ‘Note Category’ and ‘User’.
  - Clear Filter
    - This will be a button the User can click on to clear their filter selections.
    - Once a User clears their filter selections, the table view will be refreshed to show all the Prescription Note(s).
    - Filters must be added and selected for the ‘Clear Filter’ button to appear on screen.

- Prescription Note(s) added will be available for export in the following formats: Excel, Word, and PDF.

- The latest Prescription Note transaction will appear on top of the ‘Notes’ results table.

Feature Updates: Sprint 18

Pharmacy Drug Regimen Notes Cont.



Feature Updates: Sprint 18

Eligibility Eligibility History Detail Enhancements

When a TCT User navigates to a client's profile and clicks on the 'Eligibility' drop down and selects the 'Eligibility History' hyperlink, the following enhancements will occur:

- The below two columns will be added to the 'Current Eligibility History' results table:
  - Application ID
    - This will display the unique, numeric ID corresponding to the application submitted.
      - *This will be a system generated value and will be non-editable.*
  - Application Type
    - This will display the type of application submitted (e.g., New Application, Recertification, Self-Attestation, Change Request, Referral).
      - *This will be a system generated value and will be non-editable.*
  - Decision Date
    - This will display the date and timestamp an eligibility decision was made to the application submitted.
      - Format: MM/DD/YYYY HH/MM AM/PM.
    - If the application's decision was 'Pend', and a final decision (Reject / Approve / Deny) was made subsequently, the date and timestamp will be updated to reflect the latest eligibility transaction.

Feature Updates: Sprint 18

Eligibility Eligibility History Detail Enhancements Cont.

Eligibility History

Current Eligibility History

Program	Sub Program	Application ID	Application Type	Start Date	End Date	Decision Date	Decision, Reason	Override	Immediate Denial	Override Comments	Processed By
THMP	ADAP	2184863	Application	04/26/2024	07/07/2024	4/26/2024, 12:00 AM	Approve	Yes	No		admin admin

15 Showing rows 1 to 1 of 1

1

Pre-Merged Client Eligibility History

Back

Feature Updates: Sprint 18

Task Board Addition of Updates to Change Requests & Self-Attestations on Task Board

When a TCT User navigates to the Task Board screen via the 'Task Board' tile, the following enhancements will occur:

The below columns will be added to the Task Board results table:

- Client Updates
  - This column will display the type of change made to the client data for a Change Request and/or Self-Attestation application.
    - Change in Income
    - Change in Address or Residency
    - Change in Insurance
      - *Add / Update / or Remove of any type of insurance.*
    - Change in Household Composition
      - *Individuals moving in or moving out of the household or changes to the 'My Related Individual' screen.*
  - Once a Change Request and/or Self-Attestation application has had a change flagged, then the corresponding value will update to client record's 'Client Updates' column.
    - The type of change value (Income Update, Address Update, Insurance Update, or Household Update) will then appear in the 'Client Updates' column.
      - *This will be a system generated value and will be non-editable.*
  - Changes made to the below pages/sections in the application workflow, specifically for Change Request and/or Self-Attestation application types, will then be updated as a change per the 'Client Updates' column.
    - About Me (*'Contact Information' section for physical and mailing address*)
    - My Relationships
    - My Income
    - My Insurance

Feature Updates: Sprint 18

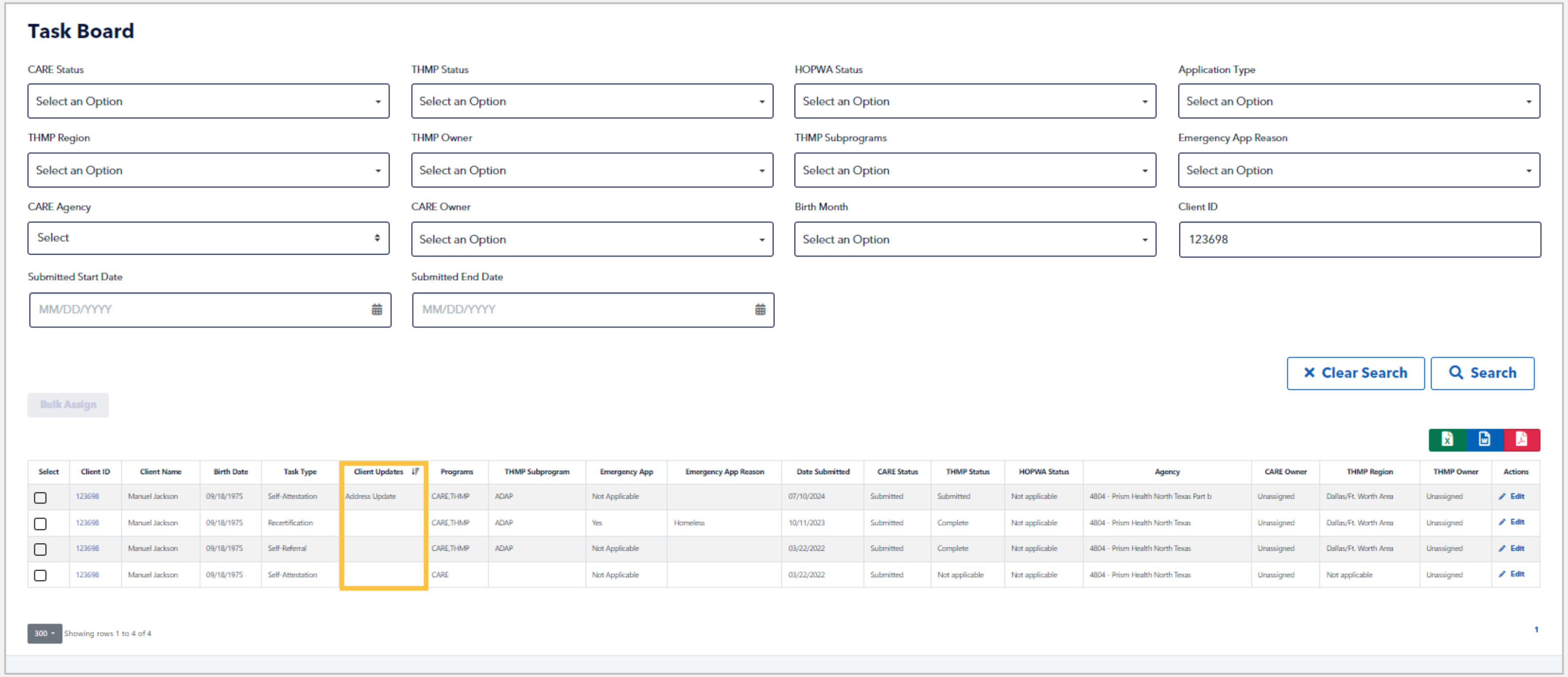
Task Board Addition of Updates to Change Requests & Self-Attestations on Task Board Cont.

- Below is an example of a User updating the client's Change Request and/or Self Attestation application and the associated value (Income Update, Address Update, Insurance Update, or Household Update) displaying in the new 'Client Updates' column on the Task Board.

Change Request / Self-Attestation Action	Corresponding 'Client Updates' Column Value
Change(s) in Income	Income Update
Change(s) in Address	Address Update
Change(s) in Insurance	Insurance Update
Change(s) in Household Composition	Household Update

Feature Updates: Sprint 18

Task Board Addition of Updates to Change Requests & Self-Attestations on Task Board Cont.



Select	Client ID	Client Name	Birth Date	Task Type	Client Updates	Programs	THMP Subprogram	Emergency App	Emergency App Reason	Date Submitted	CARE Status	THMP Status	HOPWA Status	Agency	CARE Owner	THMP Region	THMP Owner	Actions
☐	123698	Manuel Jackson	09/18/1975	Self-Attestation	Address Update	CARE,THMP	ADAP	Not Applicable		07/10/2024	Submitted	Submitted	Not applicable	4804 - Prism Health North Texas Part b	Unassigned	Dallas/Ft. Worth Area	Unassigned	Edit
☐	123698	Manuel Jackson	09/18/1975	Recertification		CARE,THMP	ADAP	Yes	Homeless	10/11/2023	Submitted	Complete	Not applicable	4804 - Prism Health North Texas	Unassigned	Dallas/Ft. Worth Area	Unassigned	Edit
☐	123698	Manuel Jackson	09/18/1975	Self-Referral		CARE,THMP	ADAP	Not Applicable		03/22/2022	Submitted	Complete	Not applicable	4804 - Prism Health North Texas	Unassigned	Dallas/Ft. Worth Area	Unassigned	Edit
☐	123698	Manuel Jackson	09/18/1975	Self-Attestation		CARE		Not Applicable		03/22/2022	Submitted	Not applicable	Not applicable	4804 - Prism Health North Texas	Unassigned	Not applicable	Unassigned	Edit

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Feature Updates: Sprint 18

Interfaces **Improving Batch Imports - Medical, Services, Update Client, and Create Client**

When a TCT User (*AA Data Manager, AA Program Staff, and/or HRAR Admin*) navigates to the 'Contracts' tile via the dashboard and clicks on the 'TCT Import' drop down and selects the 'TCT Batch Import Results' hyperlink, the following enhancements will occur:

- The new screen will be titled 'TCT Batch Import Results'.
- The below optional, search criteria fields will exist on the TCT Batch Import Results screen:
  - File Name
    - 150 maximum character limit.
    - Allowed characters for 'File Name':
      - Alphabetical Values (A – Z).
      - Numeric Values (0 – 9).
      - Special Characters:
        - Period (.)
        - Underscore (_)
    - The following Help Text will appear next to the 'File Name' search field: "You can use an asterisk (*) to do a wild card search on name fields. Note that you should enter at least 3 characters before the asterisk (*). A wild card search will not be allowed on less than 3 characters."
  - Uploaded By
    - User can search by entering in the respective importer's email address (i.e., xyz@alias.com).
      - The system logic will then display the import record(s) successfully uploaded based on the email address captured in the 'Uploaded By' field as indicated in the XML File.
        - *Only AA Data Managers, AA Program Staff, and/or HRAR Admins will have the Batch Import capability.*
  - Type of Import
    - Medical
    - Services
    - Update Client
    - Create Client

Feature Updates: Sprint 18

Interfaces Improving Batch Imports - Medical , Services Update Client, and Create Client Cont.

The below column headers and associated system generated values will exist in the TCT Batch Import Results results table:

- File Name
- Uploaded By
- Type of Import
- File Status
    - Values: Processed, Failed, or Exception
- Errors While Processing (If Any)
    - If import file location error occurs, the following will display: “File Name XXXXX errored out. Please check in the Global Scape errors folder to review the file error.”
        - ‘XXXXX’ represents the file name of the XML File uploaded.
    - If import format error occurs, the following will display: “File Name XXXXX errored out, XML not matching the prescribed format.”
        - ‘XXXXX’ represents the file name of the XML File uploaded.
    - Any errors with the file format or business validations should be logged under errors and not exceptions.
- Date and Time of Processing
- Exception Reason
    - If import file technical exception error occurs (i.e., network failure), the following will display: “File Name XXXXX exceptions out due to technical error while processing the batch file.”
        - ‘XXXXX’ represents the file name of the XML File uploaded.
    - If the file exceptions is due to network errors or bad file format, the ‘Uploaded By’ column will populate the ‘System’ value.
- Success Count
- Failure Count
- Total Count

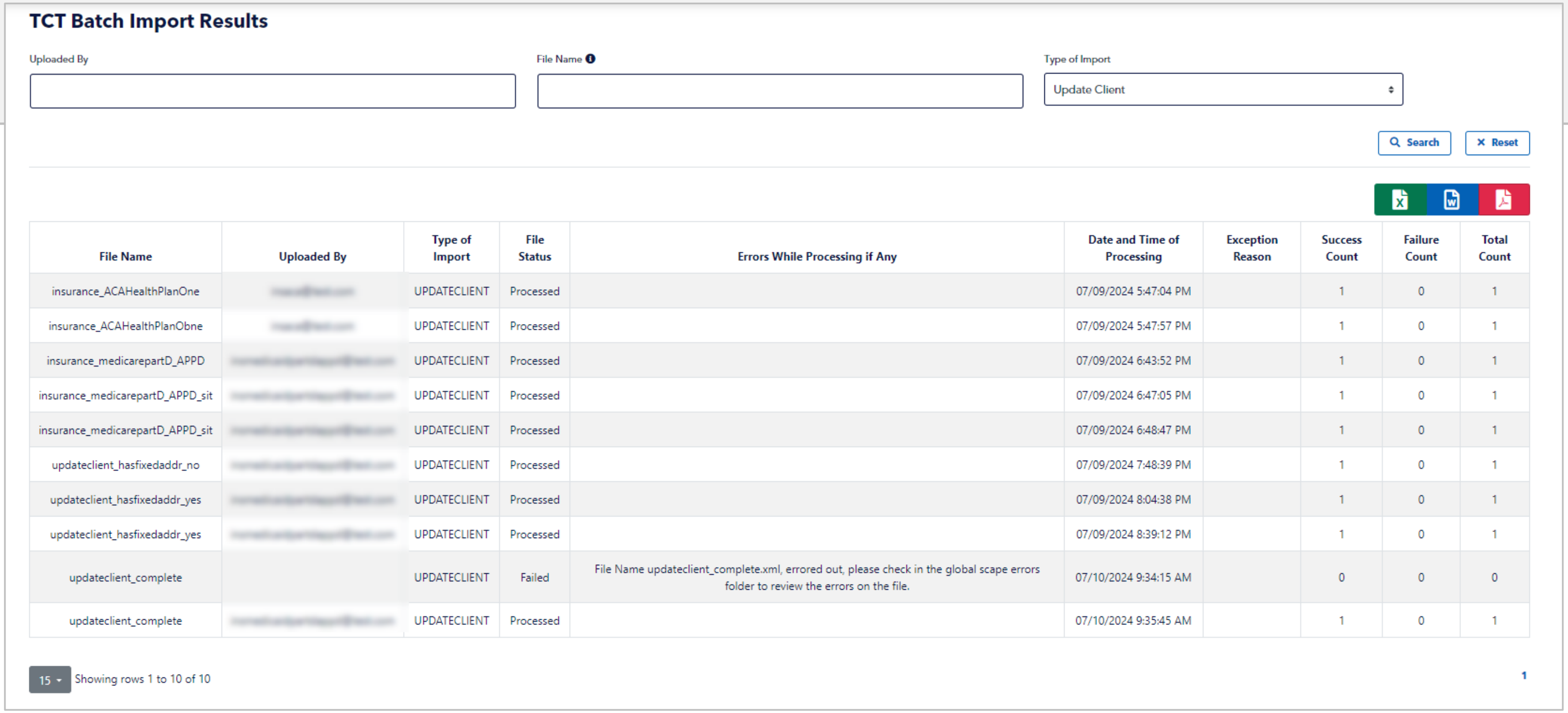
The TCT Batch Import Results results table will have the following export capabilities: Word, Excel, and PDF.

The system has increased the batch running frequency to every hour.

- The TCT back-end summary table will track the success, failure, and total count of the import record(s) for auditing purposes.

Feature Updates: Sprint 18

Interfaces Improving Batch Imports - Medical , Services Update Client, and Create Client Cont.


TCT Batch Import Results

Uploaded By

File Name

Type of Import: Update Client

Search

Reset

File Name	Uploaded By	Type of Import	File Status	Errors While Processing if Any	Date and Time of Processing	Exception Reason	Success Count	Failure Count	Total Count
insurance_ACAHealthPlanOne	[illegible]	UPDATECLIENT	Processed		07/09/2024 5:47:04 PM		1	0	1
insurance_ACAHealthPlanObne	[illegible]	UPDATECLIENT	Processed		07/09/2024 5:47:57 PM		1	0	1
insurance_medicarepartD_APPD	[illegible]	UPDATECLIENT	Processed		07/09/2024 6:43:52 PM		1	0	1
insurance_medicarepartD_APPD_sit	[illegible]	UPDATECLIENT	Processed		07/09/2024 6:47:05 PM		1	0	1
insurance_medicarepartD_APPD_sit	[illegible]	UPDATECLIENT	Processed		07/09/2024 6:48:47 PM		1	0	1
updateclient_hasfixedaddr_no	[illegible]	UPDATECLIENT	Processed		07/09/2024 7:48:39 PM		1	0	1
updateclient_hasfixedaddr_yes	[illegible]	UPDATECLIENT	Processed		07/09/2024 8:04:38 PM		1	0	1
updateclient_hasfixedaddr_yes	[illegible]	UPDATECLIENT	Processed		07/09/2024 8:39:12 PM		1	0	1
updateclient_complete		UPDATECLIENT	Failed	File Name updateclient_complete.xml, errored out, please check in the global scape errors folder to review the errors on the file.	07/10/2024 9:34:15 AM		0	0	0
updateclient_complete	[illegible]	UPDATECLIENT	Processed		07/10/2024 9:35:45 AM		1	0	1

15 Showing rows 1 to 10 of 10

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Feature Updates: Sprint 18

Interfaces Update Client Information Via Create Client Import Process

When a TCT User attempts to use the XML File to update pre-existing client information, the following enhancements will occur:

- TCT Users will now have the capability to update pre-existing client information via the XML File.
  - Updates to client information will be limited to the following:
    - Insurance
    - Address
    - Income
  - 'Client ID' is a mandatory attribute needed for a successful import via the import process.
  - The Update Client would be a batch process similar to that of the Create Client XML with a different XSD.
    - This would be a nightly batch process that would run daily in Production using OPCON.
  - Below are the XML sections where client updates will be made:
    - Address
      - Only the below transactions are allowed by the Update process:
        - If current client has only Mailing Address and the import process identifies <u>only</u> Mailing Address changes, then the address will update successfully in the TCT Portal/client's profile.
        - If current client has only Mailing Address and the import process identifies <u>both</u> Mailing Address and Physical Address changes, then both addresses (Mailing and Physical) will update successfully in the TCT Portal/client's profile.
        - If current client has both Mailing Address and Physical Address and the import process identifies <u>both</u> Mailing Address and Physical Address changes, then both address (Mailing and Physical) will update successfully in the TCT Portal/client's profile.
        - If current client has both Mailing Address and Physical Address and the import process identifies <u>only</u> Mailing Address changes, then only the Mailing Address will update successfully in the TCT Portal/client's profile – vice versa for Physical Address.

Feature Updates: Sprint 18

Interfaces Update Client Information Via Create Client Import Process Cont.

- Income
  - Only add income records will be allowed through the import process.
  - If a maximum count of 20 income records is reached, then the oldest record would be overwritten with the newly imported record.
    - Eligibility worker would need to make the determination on which income record to consider when running eligibility.
  - TCT financial screen can hold up to 10 income records maximum.
    - XSD would only allow a maximum of 10 records for client income.
- Insurance
  - If same insurance type exists for the client, then end the existing insurance record and insert the new insurance record brought in via the import process – the insurance record will update and remain as is until it is changed.
  - If the insurance type does <u>not</u> exist, then add the insurance record to the TCT Portal/client profile.
  - If the update recognizes a change in insurance, the client's profile will update accordingly based on the reference code identified.
  - TCT screen can only allow one insurance record per insurance type
    - XSD will contain validation logic to only update one insurance record per insurance type.

Feature Updates: Sprint 18

Interfaces Update Client Information Via Create Client Import Process Cont.

Address


```xml
<Address>
<IsMailingAddressPhysicalAddress>YS</IsMailingAddressPhysicalAddress>
<MailingAddress>
<AddressLine1>updatedmailaddr1</AddressLine1>
<AddressLine2>updatedmailaddr2</AddressLine2>
<City></City>
<StateCode>TX</StateCode>
<County></County>
<ZipCode5></ZipCode5>
</MailingAddress>
<PhysicalAddress>
<AddressLine1>updatedphyaddr1</AddressLine1>
<AddressLine2>updatedphyaddr2</AddressLine2>
<City>eanes</City>
<StateCode>TX</StateCode>
<County></County>
<ZipCode5></ZipCode5>
</PhysicalAddress>
</Address>
```


Insurance


```xml
<ClientInsurances>
<MedicarePartD>
        <BenefitTypeCode>MD</BenefitTypeCode>
        <StartDate>2023-01-02</StartDate>
        <EndDate>2024-10-26</EndDate>
        <MedicareNumber></MedicareNumber>
        <InsuranceName>OTR</InsuranceName>
        <!--OtherInsuranceName>OtherInsuranceName</OtherInsuranceName-->
        <PrescriptionDrugPlanName></PrescriptionDrugPlanName>
        <PlanId></PlanId>
        <IndividualPolicyNumber></IndividualPolicyNumber>
        <GroupNumber></GroupNumber>
        <RXBinNumber></RXBinNumber>
        <RXPCN></RXPCN>
        <ZipCodeMedicare>12345</ZipCodeMedicare>
        <LowIncomeSubsidyCode></LowIncomeSubsidyCode>
        <LISStartDate>2024-01-01</LISStartDate>
        <LISEndDate>2024-10-10</LISEndDate>
</MedicarePartD>
<OtherComprehensiveHealthcarePlans>
        <BenefitTypeCode>OCHP</BenefitTypeCode>
        <StartDate>2016-01-02</StartDate>
        <EndDate>2016-04-26</EndDate>
</OtherComprehensiveHealthcarePlans>
<PatienceAssistProg>
        <BenefitTypeCode>PAP</BenefitTypeCode>
        <StartDate>2016-01-02</StartDate>
        <EndDate>2016-04-26</EndDate>
</PatienceAssistProg>
</ClientInsurances>
```


Feature Updates: Sprint 18

Interfaces Update Client Information Via Create Client Import Process Cont.

Income

<ClientIncome>
<IsCurrentlyEmployed>YS</IsCurrentlyEmployed>
<HasIncomeIn30Days>YS</HasIncomeIn30Days>
<ClientIncomeDetail>
<IncomeTypeCode>LTD</IncomeTypeCode>
<IncomeSourceName>seventeen</IncomeSourceName>
<IncomeFrequencyCode>W</IncomeFrequencyCode>
<IncomeAmount1>1000.101</IncomeAmount1>
<IncomeAmount2>2000.10</IncomeAmount2>
<IncomeAmount3>3000.0</IncomeAmount3>
<IncomeAmount4>4000.1</IncomeAmount4>
<IncomeVerificationDocument>IVFP</IncomeVerificationDocument>
<StartDate>2023-09-30</StartDate>
<EndDate>2024-09-30</EndDate>
</ClientIncomeDetail>
<ClientIncomeDetail>
<IncomeTypeCode>TANF</IncomeTypeCode>
<IncomeSourceName>eighteen</IncomeSourceName>
<IncomeFrequencyCode>W</IncomeFrequencyCode>
<IncomeAmount1>100</IncomeAmount1>
<IncomeAmount2>200</IncomeAmount2>
<IncomeAmount3>300</IncomeAmount3>
<IncomeAmount4>400</IncomeAmount4>
<IncomeVerificationDocument>IVFP</IncomeVerificationDocument>
<StartDate>2023-09-30</StartDate>
<EndDate>2024-09-30</EndDate>
</ClientIncomeDetail>
<ClientIncomeDetail>
<IncomeTypeCode>LTD</IncomeTypeCode>
<IncomeSourceName>nineteen</IncomeSourceName>
<IncomeFrequencyCode>W</IncomeFrequencyCode>
<IncomeAmount1>3000</IncomeAmount1>
<IncomeAmount2>2000</IncomeAmount2>
<IncomeAmount3>3000</IncomeAmount3>
<IncomeAmount4>1000</IncomeAmount4>
<IncomeVerificationDocument>IVFP</IncomeVerificationDocument>
<StartDate>2023-09-30</StartDate>
<EndDate>2024-09-30</EndDate>
</ClientIncomeDetail>
<ClientIncomeDetail>
<IncomeTypeCode>LTD</IncomeTypeCode>
<IncomeSourceName>twenty</IncomeSourceName>
<IncomeFrequencyCode>W</IncomeFrequencyCode>
<IncomeAmount1>1</IncomeAmount1>
<IncomeAmount2>2</IncomeAmount2>
<IncomeAmount3>3</IncomeAmount3>
<IncomeAmount4>4</IncomeAmount4>
<IncomeVerificationDocument>IVFP</IncomeVerificationDocument>
<StartDate>2023-09-30</StartDate>
<EndDate>2024-09-30</EndDate>
</ClientIncomeDetail>
</ClientIncome>

