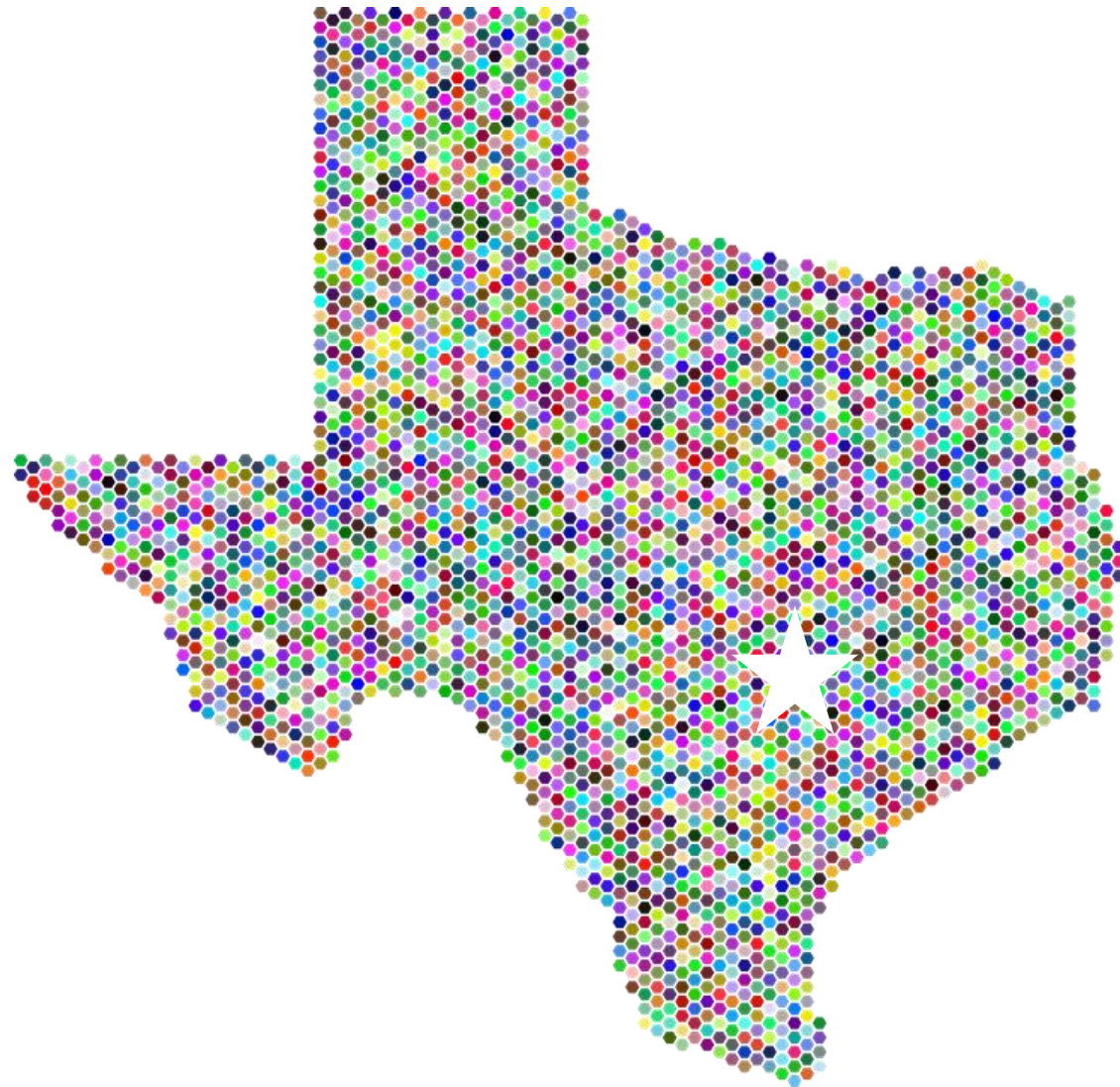


Take Charge Texas (TCT) User Engagement Session

October 10th, 2024



Meet the Facilitators

DSHS/HHSC TEAM



Charletha Joseph
Program Support



Rachel Sanor
HIV Care and
Medications Unit
Director



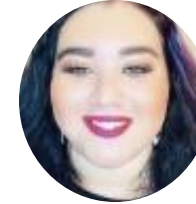
Christine Salinas
ADAP Regional
Manager



Janina Vazquez
HIV Care Services
Group Manager



Holly Benavides
TCT Help Desk Program
Specialist



Ethel Garcia
Medication Data and Analysis
Group Manager

DELOITTE TEAM



Nikki Fernandes
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Krishna Dixit
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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**](https://PollEV.com/tctdshsstaff)

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

What do you hope to learn through this session?



Today's Objectives

The objective of today's session is to provide an overview of new features implemented in the TCT system and gather your feedback to ensure the features we plan to implement in the future result in improved client service delivery and health outcomes for people with HIV in Texas.



TCT Roadmap 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
- SFTP Process: Service Records Updates
- SFTP Process: Service Records – Successful Client Update Email
- SFTP Process: Service Records – Failed Client Update Email
- SFTP Process: Medical Records Updates
- SFTP Process: Medical Records – Successful Client Update Email
- SFTP Process: Medical Records – Failed Client Update Email

Sprint 11

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

Sprint 12

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

Project Plan: Successfully Completed Features

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



SPRINT 13

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



SPRINT 14

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



SPRINT 15

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



SPRINT 16

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

User Stories

Sprint 13

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

Sprint 14

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

Sprint 15

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

Sprint 16

- Display THMP Referral on the Eligibility Period Selection Screen
- Eligibility Enhancements for Various THMP Referral Application Decisions
- Client Name Enhancements
- Eligibility History to Include Pre-Merged Eligibility Transactions
- Task Board Pending 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

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 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.



SPRINT 19

Focused on implementing the Order Status flag for Open(Started) and Open(Empty) orders enabling the ability for THMP Admin and/or ADAP Order Processor Users to update the order(s) to the new Closed(Empty) status. Improved the Staff Activity Audit Report to identify Client Profile updates and integrated screen navigation via hyperlinks. Introduced the Universal Service Utilization Report to provide a comprehensive, data-driven report of Client Services and Medical Information for HRSA and internal audit reporting.



SPRINT 20

Focusing on modifying existing queries via the Ad Hoc Query Builder by enabling the ability to edit/update search criteria filters. Improving the Pharmacy Portal by implementing System logic to identify deactivated pharmacies on the Order Overrides screen. Enhancing the STAR Report to include search criteria filters and associated values on the report outputs, incorporating Insurance results tables and applicable values on the report outputs, and introducing the Contract search criteria selection when curating the STAR Report. Introducing the CARE Plan Task Report, providing details of CARE Plans for Clients, ensuring comprehensive analysis of care can be performed.

User Stories

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

Sprint 19

- Notification Center - Select All Enhancement
- Notification Center - Expiration Notification Enhancement
- Agency and Client Portals - Save & Exit Enhancement
- Agency Portal Login Screen Enhancement
- Contracts - Edit Total Budget Amount Enhancement
- Modifications to Household Detail Input Requirements
- Display Application ID on Application History Screen
- Updating Eligibility Rules for HIV Diagnosis
- Auto-Denying ADAP Clients Upon Eligibility Period Expiration
- Task Board Bulk Edit Enhancements
- Drug Regimen and Case Notes Real Time Synchronization of Prescription Notes
- Resolving Open(Started) and Open(Empty) Medication Orders on Orders Screen
- Addition of Pharmacy Information on Orders, Shipping Status, and Review Order Screens
- Hold Screen Enhancements
- Expanding Parameters of Staff Activity Audit Report
- Universal Service Utilization Report

Sprint 20

- Race and Sub Origin Enhancements
- Help Text Enhancement for All Applications
- Display Previously Selected Agency on Subsequent Applications
- Identifying Deactivated Pharmacies on Order Overrides Screen
- Application Submission Success Screen Enhancements
- Removing Pharmacy Assignments on Assign/Change Pharmacy Screen
- Ad Hoc Report: Client Race & Client Ethnicity Origin Table and Column Name Enhancements
- Ad Hoc Report: Pharmacy Table and Column Name Enhancements
- Ad Hoc Report: Modifying Existing Queries
- STAR Report Contracts Addition
- ACA Insurance Detail Enhancements
- STAR Report Export Enhancements
- STAR Report Output Insurance Enhancements
- CARE Plan Task Report
- Updates to Inactive Clients

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 21.



System Overview: **New** TCT Features



Live Demonstration of TCT Features

TCT Features Video Presentation

- [Race and Sub Origin Enhancements](#)
- [Help Text Enhancement for All Applications](#)
- [Display Previously Selected Agency on Subsequent Applications](#)
- [Identifying Deactivated Pharmacies on Order Overrides Screen](#)
- [Application Submission Success Screen Enhancements](#)
- [Removing Pharmacy Assignments on Assign/Change Pharmacy Screen](#)
- [Ad Hoc Report: Client Race & Client Ethnicity Origin Table and Column Name Enhancements](#)
- [Ad Hoc Report: Pharmacy Table and Column Name Enhancements](#)
- [Ad Hoc Report: Modifying Existing Queries](#)
- [STAR Report Contracts Addition](#)
- [ACA Insurance Detail Enhancements](#)
- [STAR Report Export Enhancements](#)
- [STAR Report Output Insurance Enhancements](#)
- [CARE Plan Task Report](#)
- [Updates to Inactive Clients](#)



Poll Everywhere

Poll Everywhere

Please navigate to the following Poll Everywhere Link to respond to the following question:

If you are a **DSHS Staff member**, please use this link:
PolleEV.com/tctdshsstaff

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

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



Gathering Your Feedback



Poll Everywhere

Poll Everywhere

Please navigate to the following Poll Everywhere Link to respond to the following question:

If you are a **DSHS Staff member**, please use this link:
PollEV.com/tctdshsstaff

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

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



How to Provide Feedback to TCT?

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

Our team always welcomes your feedback!

Please feel free to reach out to **Charletha Joseph** at Charletha.Joseph@dshs.texas.gov.

Reasons to Provide Feedback

☐

TCT System will include enhancements that cater to your responsibilities!

☐

Your Clients will benefit with the Enhancements and Maintenance of the System!

Next Steps



Upcoming Activities

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



Charletha Joseph

Charletha.Joseph@dshs.texas.gov



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

Thank You!

System Overview: **New** TCT Features



Feature Updates: Sprint 20

Agency Portal Client Pages Updates to Inactive Clients

When a TCT User navigates to an **Other Inactive** Client's Dashboard, the following enhancements will occur:

- The 'Apply Now' button will now be viewable and clickable for the User to initiate a New Application.
 - *This is because the Other Inactive Client is currently not enrolled in any services.*
- Once the User successfully submits a New Application via the 'Apply Now' button, the Client's Status will then update from Inactive to Active.
- This enhancement is applicable to both Agency and Client Portals.

'Apply Now' Button Viewable and Clickable for Other Inactive Clients

Client Application Dashboard

New Application

Alex is not enrolled in any services or programs.

Please click the 'Apply Now' button below to apply for any TakeChargeTexas programs. You will be able to begin your application process for medications, medical care, or support services. To learn more about TakeChargeTexas programs available to you please click the "Apply Now" button below.

Apply Now

Client Status Before Initiating New Application

Alex's Account Information

Client ID: [REDACTED]

Phone Number: [REDACTED]

Email: [REDACTED]

Client Status: Inactive

Edit Client Profile

Client Status After Submitting New Application

Alex's Account Information

Client ID: [REDACTED]

Phone Number: [REDACTED]

Email: [REDACTED]

Client Status: Active

Edit Client Profile

Feature Updates: Sprint 20

Agency Portal Client Pages Updates to Inactive Clients Cont.

When a TCT User navigates to a **Deceased** Client's Dashboard, the following enhancements will occur:

- If a Client's Profile is flagged as Inactive - Deceased, only HRAR Admins and AA Data Managers will have the permissions to change the Client's Status from Inactive to Active via the 'Is Client Active?' single-select drop down on the Edit Client Profile screen.
 - *For all other Users, the 'Is Client Active?' question will remain grayed out/non-editable.*
- Only HRAR Admins and AA Data Managers will have the ability to update a Client's Status on the Edit Client Profile screen.
 - *This includes both Client Inactivation Types:*
 - *Other Inactive*
 - *Deceased*
- This enhancement is applicable to the Agency Portal only.

HRAR Admin Updates Status of Inactive - Deceased Client

Client Details

First Name *	Middle Name	Last Name *
		alvaroz
Client ID	Mother's Maiden Name	Date of Birth *
1		04/29/1994
Gender *	Social Security Number	Individual Taxpayer Identification Number
Male	*****	XXXXXXXXXX
DL/State ID	Primary Phone *	Primary Email *
XXXXXXXXXX	(817) 217-6288	

Note:
By selecting 'Yes' to share your status, Take Charge Texas allows your HIV service providers to share your Personal Health Information with each other, saving you both time and paperwork. For most clients, you will only need to provide your information once and will not have to complete multiple applications at each organization you access for services. This allows providers to coordinate services and referrals more easily for and with you.
By selecting 'No' to share your status, you will need to complete an application and verify your eligibility documents for each program and at each organization you access for services. This will increase the time it takes to process your application and the amount of paperwork you will be required to submit each time you visit a new provider.

Share Status *	Is Client Active?	Client Inactive Type *
Yes	Inactive	Deceased
Date of Death *	Select Active Inactive	

Feature Updates: Sprint 20

Agency Portal Client Pages Updates to Inactive Clients Cont.

Non-Admin/Data Manager User Attempts to Update Status of Inactive - Deceased Client

First Name *	Middle Name	Last Name *
Client ID	Mother's Maiden Name	Date of Birth *
Gender *	Social Security Number	Individual Taxpayer Identification Number
DL/State ID	Primary Phone *	Primary Email *

Note:

By selecting 'Yes' to share your status, Take Charge Texas allows your HIV service providers to share your Personal Health Information with each other, saving you both time and paperwork. For most clients, you will only need to provide your information once and will not have to complete multiple applications at each organization you access for services. This allows providers to coordinate services and referrals more easily for and with you.

By selecting 'No' to share your status, you will need to complete an application and verify your eligibility documents for each program and at each organization you access for services. This will increase the time it takes to process your application and the amount of paperwork you will be required to submit each time you visit a new provider.

Share Status *	Is Client Active?	Client Inactive Type *
Date of Death *		

Save

Feature Updates: Sprint 20

Agency Portal Client Pages Updates to Inactive Clients Cont.

The ability to add notes on the respective Case Notes screens will be available for both **Other Inactive** and **Deceased** Client Statuses.

Case Notes

Add a Note

Select Note Category *

Select

Note *

You have 8000 characters remaining.

Add Notes

All Notes

Note Category

Select

User

Select an Option

Provider Agency

Select

Filter

Notes

admin, admin - 4800 - Texas Department of State Health Services - 8/20/2024, 12:15 PM - Medication Drop Detail

TEST

Showing rows 1 to 1 of 1

Other Inactive Client Case Notes Screen

Deceased Client Case Notes Screen

Case Notes

Add a Note

Select Note Category *

Select

Note *

You have 8000 characters remaining.

Add Notes

All Notes

Note Category

Select

User

Select an Option

Provider Agency

Select

Filter

Notes

admin, admin - 4800 - Texas Department of State Health Services - 8/20/2024, 12:15 PM - Medication Drop Detail

TEST

Showing rows 1 to 1 of 1

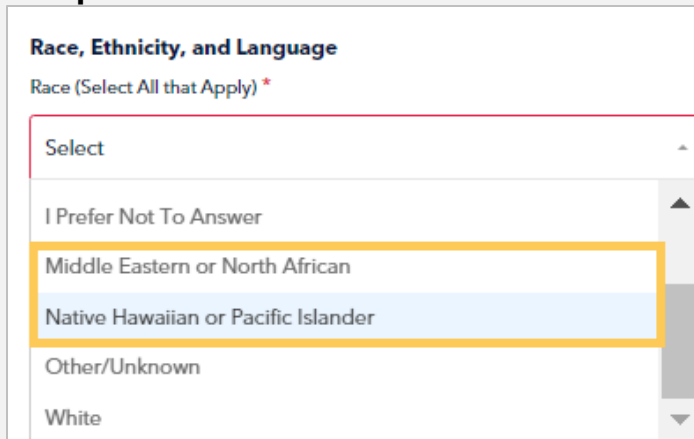
Feature Updates: Sprint 20

Agency Portal Client Pages Race and Sub Origin Enhancements

When a TCT User navigates to the About Me screen of an Application Workflow or the About You screen of a Client's Profile, the following enhancements will occur:

- The 'Race' multi-select drop down will now include new and updated races, including:
 - Native Hawaiian or Pacific Islander
 - *Previously 'Native Hawaiian'*
 - Middle Eastern or North African
- The following Spanish translations will exist in the Client Portal:
 - Nativo/a de Hawái u otra isla del Pacifico
 - African Medio-Oriental o Norteafricano/a

New and Updated Races on About Me/About You Screens



Race, Ethnicity, and Language
Race (Select All that Apply) *

Select

I Prefer Not To Answer

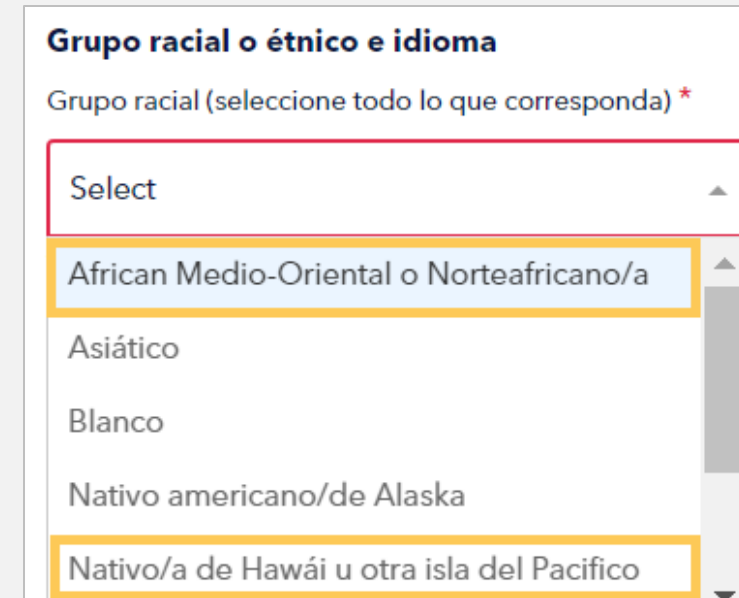
Middle Eastern or North African

Native Hawaiian or Pacific Islander

Other/Unknown

White

Race Spanish Translations in Client Portal



Grupo racial o étnico e idioma
Grupo racial (seleccione todo lo que corresponda) *

Select

African Medio-Oriental o Norteafricano/a

Asiático

Blanco

Nativo americano/de Alaska

Nativo/a de Hawái u otra isla del Pacifico

Feature Updates: Sprint 20

Agency Portal Client Pages Race and Sub Origin Enhancements Cont.

When a TCT User navigates to the About Me screen of an Application Workflow or the About You screen of a Client's Profile, the following enhancements will occur:

- Two new Sub Origin single-select, conditional drop downs will display:
 - Native Hawaiian or Pacific Islander Origin
 - Middle Eastern or North African Origin

- The following Spanish translations will exist in the Client Portal:

- Origen nativo/a de Hawái o de las islas del Pacífico
- Origen de Oriente Medio o Origen Norteafricano/a

- The Native Hawaiian or Pacific Islander Origin single-select, conditional drop down will include the following picklist values available for selection:

- Native Hawaiian
 - Spanish translation: Nativo/a de Hawái*
- Guam
 - Spanish translation: Guameño/a*
- Samoa
 - Spanish translation: Samoano/a*
- Chamorro
 - Spanish translation: Chamorro/a*
- Tongan
 - Spanish translation: Tongano/a*
- Fijian
 - Spanish translation: Fiyiano/a*
- Marshallese
 - Spanish translation: Marshalés*
- Other
 - Spanish translation: Otro*
- Other Pacific Islander
 - Spanish translation: Otros isleños/as del Pacífico*

New Race-Sub Origin Conditional Drop Downs

The screenshot shows a form titled "Race, Ethnicity, and Language" with a sub-header "Race (Select All that Apply) *". There are two main sections. The first section, "Native Hawaiian or Pacific Islander Origin", contains a single-select drop-down menu with options: "Middle Eastern or North African", "Native Hawaiian or Pacific Islander", and "Other Pacific Islander". The second section, "Middle Eastern or North African Origin", contains a single-select drop-down menu with the option "Moroccan".

Native Hawaiian or Pacific Islander Sub Origin Values

The first screenshot shows the "Native Hawaiian or Pacific Islander Origin" drop-down menu with the following values: Select, Chamorro, Fijian, Guam, Marshallese, Native Hawaiian, Other, Other Pacific Islander, Samoa, and Tongan. The second screenshot shows the "Origen nativo/a de Hawái o de las islas del Pacífico" drop-down menu with the following values: Select, Chamorro/a, Fiyiano/a, Guameño/a, Marshalés, Nativo/a de Hawái, Otro, Otros isleños/as del Pacífico, Samoano/a, and Tongano/a.

Feature Updates: Sprint 20

Agency Portal Client Pages Race and Sub Origin Enhancements Cont.

When a TCT User navigates to the About Me screen of an Application Workflow or the About You screen of a Client's Profile, the following enhancements will occur:

- The Middle Eastern or North African Origin single-select, conditional drop down will include the following picklist values available for selection:
 - Lebanese
 - Spanish translation: Libanés*
 - Iranian
 - Spanish translation: Iraní*
 - Egyptian
 - Spanish translation: Egipcio/a*
 - Syrian
 - Spanish translation: Sirio/a*
 - Iraqi
 - Spanish translation: Iraquí*
 - Israeli
 - Spanish translation: Israelí*
 - Moroccan
 - Spanish translation: Marroquí*
 - Yemeni
 - Spanish translation: Yemení*
 - Kurdish
 - Spanish translation: Kurdo/a*
 - Other
 - Spanish translation: Otro*
 - Other Middle Eastern or North African
 - Spanish translation: Otro de Oriente Medio o Norteafricano/a*

Middle Eastern or North African Sub Origin Values

Middle Eastern or North African Origin:

Select

Select

Egyptian

Iranian

Iraqi

Israeli

Kurdish

Lebanese

Moroccan

Other

Other Middle Eastern or North African

Syrian

Yemeni

Origen de Oriente Medio o Origen Norteafricano/a

Select

Select

Egipcio/a

Iraní

Iraquí

Israelí

Kurdo/a

Libanés

Marroquí

Otro

Otro de Oriente Medio o Norteafricano/a

Sirio/a

Yemení

Feature Updates: Sprint 20

Agency Portal Client Pages Race and Sub Origin Enhancements Cont.

- When a TCT User navigates to the About Me screen of an Application Workflow or the About You screen of a Client's Profile, the following enhancements will occur:
- The Race and Sub Origin value(s), indicated in the application, will appear in the Application Review Summary screen.
 - The Race and Sub Origin value(s), indicated in the application, will also appear in the Application History screen's Accessible View and Download PDF actions of a Client's Profile.
 - The Race and Sub Origin enhancements will be applicable to the following Agency Portal reports:
 - STAR Report
 - HAB Report
 - Ad Hoc Query Report
 - RSR Report
 - This enhancement is applicable across all Application Types, including:
 - New Application
 - Recertification
 - Self-Attestation
 - Change Request
 - Referral
 - The Race and Sub Origin enhancements is applicable to both the Agency and Client Portals.

Accessible View on Application History Screen

Race, Ethnicity, and Language

Race: **Middle Eastern or North African, Native Hawaiian or Pacific Islander**

Are you Hispanic: **No**

Native Hawaiian or Pacific Islander Origin: **Native Hawaiian**

Middle Eastern or North African Origin: **Other Middle Eastern or North African**

Download PDF on Application History Screen

Race	Race Sub Type
Middle Eastern or North African	Other Middle Eastern or North African
Native Hawaiian or Pacific Islander	Native Hawaiian

Feature Updates: Sprint 20

Agency Portal Client Pages Help Text Enhancements for All Applications

When a TCT User navigates through an Application Workflow in both the Agency and Client Portals, the following enhancement will occur:

- On each screen of the Application Workflow, where applicable, the Help Text language indicating required fields will be updated, stating the following:
 - Note: "All fields marked * are required. If you need assistance, please use the Help button above."
 - Spanish translation: Nota: Todos los campos marcados con * son requeridos. Si necesita ayuda, utilice el botón de Ayuda de arriba.*
- The Help Text enhancement is applicable across all Application Types, including:
 - New Application
 - Recertification
 - Self-Attestation
 - Change Request
 - Referral
- The same Help Text can also be found within a Client's Profile.
- The Help Text enhancement is applicable to both the Agency and Client Portals.

Agency & Client Portals

Contact Information

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

Update Information

Tell us about your contact information. All fields marked with * are required. If you need assistance, please use the Help button above.

Physical Address

Do you have a fixed address? *

No

What is your current living situation?

Client Portal Spanish Translation

2 Información de contacto

Nota: Todos los campos marcados con * son requeridos. Si necesita ayuda, utilice el botón de Ayuda de arriba.

Domicilio físico

¿Tiene una dirección fija? *

¿Cuál es su situación actual de vivienda?

Feature Updates: Sprint 20

Agency Portal Client Pages Display Previously Selected Agency on Subsequent Applications

When a TCT User navigates through a subsequent application, the following enhancement will occur:

- A new section, titled '**Previously Selected Agency**', will now display on the Agency Selection screen.
 - This new section will indicate the selected agency of the most recent, previously submitted application which will be available for selection for the subsequent application.
 - This new section will appear above the existing 'Please select a service provider' section on the subsequent application.
- This enhancement is applicable to the following Application Types:
 - Recertification
 - Self-Attestation
 - Change Request
 - Referral
- This enhancement is NOT applicable to the following Application Type:
 - New Application
- This enhancement is applicable to both Agency and Client Portals.

Previously Selected Agency on Subsequent Application

The screenshot displays the 'Agency Selection' form. At the top, there are input fields for 'County' (with 'Harris' selected) and 'Zip Code'. Below these are 'Clear' and 'Search' buttons. A section titled 'Previously Selected Agency' is highlighted with a yellow border. It contains a dark blue square icon, a placeholder address, and a placeholder phone number. Below this section is a red asterisk followed by the text 'Please select a service provider'. At the bottom, there is another dark blue square icon, a placeholder address, a placeholder phone number, and a placeholder email field.

Feature Updates: Sprint 20

Agency Portal Client Pages Application Submission Screen Enhancements

When a TCT User navigates to the Application Submission Success screen after submitting an application, the following enhancements will occur:

- The existing Application Number, found under the Application Details section, will be renamed to '**Application ID**'.
- The following language, found under the Next Steps section, will be removed:
 - "If we have any questions about your information, we will reach out to you."
 - "You can check the status of your case on this website. We will also mail you a letter."
- The following language, found under the Next Steps section, will be added:
 - "If we require additional information, we will contact you, depending on your contact preferences."
 - "You can check the status of your application on takechargetexas.gov."
- The Client Portal will be updated to include the following Spanish translations:
 - Application ID:
 - Número de solicitud
 - If we require additional information, we will contact you, depending on your contact preferences:
 - Si requerimos información adicional, nos comunicaremos con usted, según sus preferencias de contacto.
 - You can check the status of your application on takechargetexas.gov:
 - Puede verificar el estado de su solicitud en takechargetexas.gov.
- The existing language on the Application Submission Success screen will be updated to the following (*with applicable Client Portal Spanish translations*):
 - Success – Application Submitted to "Application Submitted!"
 - ¡Solicitud Enviada!
 - Success – Change Request Has Been Submitted to "Change Request Submitted!"
 - ¡Solicitud de Cambio Enviada!
 - Success – Referral Has Been Submitted to 'Referral Submitted!"
 - ¡Referencia Enviada!
 - Success – Review Submitted to 'Review Submitted!"
 - ¡Revisión Enviada!
 - Success – Updated Submitted to 'Update Submitted!"
 - ¡Actualización Enviada!

Feature Updates: Sprint 20

Agency Portal Client Pages Application Submission Screen Enhancements Cont.

- This enhancement applies to all Application Types, including:
 - New Application
 - Recertification
 - Self-Attestation
 - Change Request
 - Referral
- This enhancement is applicable to both the Agency and Client Portals.

Application Submission Success Screen – Agency & Client Portals

 **Referral Submitted!**

Thank you for submitting your online application

Thank you for submitting your online application. If applicable, an HHSC representative will be calling you to complete your interview over the phone. Please be advised, HHSC representatives call from all over the state so you may receive a call from outside your area code.

Application Details

Application ID:

Services updated:

- THMP-Medications (ADAP)
- THMP-Insurance (TIAP)
- Food and Nutrition Assistance
- Returning to Care

Next steps:

- If you have not uploaded all the necessary documents, you can do so through the dashboard.
- If we require additional information, we will contact you, depending on your contact preferences.
- We will let you know if you can get benefits
- You can check the status of your application on [takechargetexas.gov](#).

[GO TO DASHBOARD](#)

Application Submission Success Screen – Client Portal Spanish Translations

 **¡Referencia Enviada!**

Gracias por enviar su solicitud en línea

Gracias por enviar su solicitud en línea. Si corresponde, un representante de la HHSC le llamará para realizar su entrevista por teléfono. Tome en cuenta que los representantes de la HHSC llaman desde cualquier parte del estado, es posible que reciba una llamada de un código de área diferente al suyo.

Detalles de la solicitud

ID de aplicación: 2212849

Servicios actualizados:

- Atención médica para el VIH (búsqueda de un médico)

Siguientes pasos:

- Revisaremos su solicitud.
- Si requerimos información adicional, nos comunicaremos con usted, según sus preferencias de contacto.
- Le informaremos si puede recibir beneficios
- Puede verificar el estado de su solicitud en [takechargetexas.gov](#).

[IR AL PANEL DE CONTROL](#)

Feature Updates: Sprint 20

Agency Portal Client Pages ACA Insurance Detail Enhancements

When a TCT User navigates to the My Insurance screen of an Application Workflow or the Insurance Information screen of a Client's Profile, the following enhancements will occur:

- The ACA Health Plan, Obama Care, or Market Place Plans insurance type will be updated to **'ACA or Marketplace Plans'**.
 - The following Spanish translation will exist in the Client Portal:*
 - ACA o planes de mercado
 - Any saved ACA insurance record(s) on the Insurance History screen will be updated to reflect the new language.
- The ACA Health Plan, Obama Care, or Market Place Plans section will be updated to reflect the 'ACA or Marketplace Plans' language.
- The ACA or Marketplace Plans picklist values for the 'Medical Insurance Name' single-select drop down, found on the Insurance Information screen, will be updated to the following (applicable to the Agency Portal only):

- Aetna
- Allegian Choice
- Ambetter
- Blue Cross Blue Shield
- Cigna
- Community Health Choice
- CVS Health
- Humana Inc
- Molina
- Other
- Scott and White Health Plan
- Sendero
- United HealthCare

ACA or Marketplace Plans Insurance Type on My Insurance Screen

My Insurance

Update My Insurance
Please check that all the information on this page is current. If any information is not current, please click on the 'Update Information' button on the relevant section and update it.

Insurance Details
Tell us about your health information. All fields marked with * are required. If you need assistance, please use the Help button above.

Do you have any of the following insurance benefits? (Select all that apply)

Select

ACA or Marketplace Plans

CHIP

COBRA

County indigent health plan

I do not currently have health insurance or have lost my insurance more than 90 days ago

Save & Exit Continue

- A new column, titled 'Other Insurance Name', will be added to the Current Insurance History Log pop up to display the value entered and saved by the User, sourced from the 'Other Insurance Name' free text field, for the applicable insurance record(s), where the 'Other' insurance name option is selected (applicable to the Agency Portal only).

Feature Updates: Sprint 20

Agency Portal Client Pages ACA Insurance Detail Enhancements Cont.

ACA or Marketplace Plans Insurance Type on Insurance Information Screen

Insurance Information

Insurance Details

Select

ACA or Marketplace Plans

CHIP

COBRA

County indigent health plan

I do not currently have health insurance or have lost my insurance more than 90 days ago

Ramsell ID

Save Changes

ACA or Marketplace Plans Insurance Record on Insurance Information Screen

Insurance History

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

Current Insurance Details

Updated By	Start Date	End Date	Insurance Type	Actions
testhradmin			ACA or Marketplace Plans	History

Previous Insurance History

Updated By	Insurance Removed Date	Start Date	End Date	Insurance Type	Actions
0000344932	03/19/2024			I do not currently have health insurance or have lost my insurance more than 90 days ago	History
testhradmin				Private/employer insurance or Veteran's Affairs (VA) insurance	History

Feature Updates: Sprint 20

Agency Portal Client Pages ACA Insurance Detail Enhancements Cont.

**ACA or Marketplace Plans Updated Picklist Values for the 'Medical Insurance Name'
Drop Down on the Insurance Information Screen (*Applicable to Agency Portal Only*)**

ACA or Marketplace Plans

Start Date

MM/DD/YYYY

End Date ⓘ

MM/DD/YYYY

Medical Insurance Name

Select

Aetna

Allegian Choice

Ambetter

Blue Cross Blue Shield

CVS Health

RX Bin Number

Plan ID

Group Number

RX PCN

Save Changes

Feature Updates: Sprint 20

Agency Portal Client Pages ACA Insurance Detail Enhancements Cont.

‘Other Insurance Name’ Column Added to Current Insurance History Log Pop Up on the Insurance History Screen
(Applicable to the Agency Portal Only)

Current Insurance History Log
ACA or Marketplace Plans

X

W

Updated By	Date	Start Date	End Date	Medical Insurance Name	Other Insurance Name	Prescription Drug Plan Name	Plan ID	Policy Number	Group Number	RX Bin Number	RX PCN
admin ,admin	09/13/2024			Other	TEST						
admin ,admin	09/13/2024			--							

15 ▾

Showing rows 1 to 2 of 2

1

Close

Feature Updates: Sprint 20

Pharmacy Identifying Deactivated Pharmacies on the Order Overrides Screen

When a THMP Admin and/or ADAP Order Processor User navigates to the Order Overrides screen, the following enhancements will occur:

- The following enhancements will now exist on the Order Overrides screen so THMP Admin and/or ADAP Order Processor Users can detect if a pharmacy has become deactivated in between the time the User initially placed the order and the time the THMP Admin and/or ADAP Order Processor User makes a decision on the order override request(s):
 - A new column will be added to the right of the existing Pharmacy ID column on the Order Overrides results table titled '**Pharmacy Dropped Date**'.
 - This column will display the pharmacy's Dropped Date sourced from the 'Dropped Date' field on the Pharmacy Details screen.
 - If the pharmacy's Dropped Date is past the current date (*as of today's date*), the System will identify the order override record's pharmacy as deactivated.
 - If the pharmacy's Dropped Date is in the future of the current date (*as of today's date*), the System will identify the order override record's pharmacy as active.
 - If the pharmacy's Dropped Date is empty/blank, then the Pharmacy Dropped Date column will display a double dash (--) as the System will identify the pharmacy as active as no drop date exists.
 - A new validation message pop up will display on the Order Overrides screen when a THMP Admin and/or ADAP Order Processor User clicks on the 'Approve' action button for an order override record's pharmacy that is deactivated:
 - Message:** "Pharmacy 'XYZ' is deactivated as of MM/DD/YYYY". As the pharmacy is deactivated, the medication order cannot be submitted. Please update the pharmacy assignment for the Client."
 - 'XYZ' references the Pharmacy ID value sourced from the 'Pharmacy Code' field on the Pharmacy Details screen.*
 - 'MM/DD/YYYY' references the Dropped Date value sourced from the 'Dropped Date' field on the Pharmacy Details screen.*
 - The new validation message pop up will include the below button that the User must click on to close out of the message:
 - Cancel
 - No other action button will display on the validation message pop up as the pharmacy is deactivated and no approval action can be taken by the User on the order override request.*
 - Existing approve and deny validation message pop ups will continue to display if the order override record's pharmacy is not deactivated and is active.

Pharmacy Deactivation Validation Message Pop Up

Pharmacy 45 is deactivated as of 09/09/2024. As the pharmacy is deactivated, the medication order cannot be submitted.
Please update the pharmacy assignment for the Client.

Cancel

Feature Updates: Sprint 20

Pharmacy Identifying Deactivated Pharmacies on the Order Overrides Screen Cont.

'Pharmacy Dropped Date' Column in Order Overrides Results Table

Order Overrides

Pharmacy ID	Pharmacy Dropped Date	Trade Name	Generic Name	Dosage Strength	Measure	Form	Day Supply	Quantity	Last Order Date	Denial Reason	Client ID	Client Name	D.O.B	Reason for Override	Status	Approve/Deny	Select
45	--	GENVOYA (30/bt)	Genvoya	150:200:10	MG	TAB	30	1	07/30/2024	Too early for a refill				TEST	Approved	✓ Approve ⊗ Deny	☐ Select
45	--	Dovato (30/bt)	dolutegravir/lamivudine	50:300	MG/MG	TAB	30	1	07/11/2024	Too early for a refill				test	--	✓ Approve ⊗ Deny	☐ Select
45	--	AMLODIPINE (90/bt)	amlodipine	5	MG	TAB	90	1	--	Too early for a refill				test	--	✓ Approve ⊗ Deny	☐ Select
326	--	ABACAVIR (60/bt)	Abacavir	300	MG	TAB	90	3	06/17/2024	Quantity has exceeded MaxPerMonth for Medication					--	✓ Approve ⊗ Deny	☐ Select
45	--	BIKTARVY (30/bt)	bictegravir/emtricitabine/tenofovir ala	50:200:25	MG/MG/MG	TAB	30	1	07/30/2024	Too early for a refill				TEST	--	✓ Approve ⊗ Deny	☐ Select
67	04/24/2026	Atorvastatin (90/bottle)	atorvastatin calcium	10	MG	TAB	90	1	06/05/2024	Too early for a refill				transferred in batch 53703	--	✓ Approve ⊗ Deny	☐ Select
148	--	BIKTARVY (30/bt)	bictegravir/emtricitabine/tenofovir ala	50:200:25	MG/MG/MG	TAB	30	1	08/06/2024	Too early for a refill				OA	--	✓ Approve ⊗ Deny	☐ Select
148	--	BIKTARVY (30/bt)	bictegravir/emtricitabine/tenofovir ala	50:200:25	MG/MG/MG	TAB	30	1	08/06/2024	Too early for a refill				ww	--	✓ Approve ⊗ Deny	☐ Select
148	--	BIKTARVY (30/bt)	bictegravir/emtricitabine/tenofovir ala	50:200:25	MG/MG/MG	TAB	30	1	08/06/2024	Too early for a refill				ww	--	✓ Approve ⊗ Deny	☐ Select
148	--	BIKTARVY (30/bt)	bictegravir/emtricitabine/tenofovir ala	50:200:25	MG/MG/MG	TAB	30	1	08/06/2024	Too early for a refill				OA	--	✓ Approve ⊗ Deny	☐ Select

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Showing rows 1 to 10 of 10

Submit Order

Feature Updates: Sprint 20

Pharmacy Removing Pharmacy Assignments on the Assign/Change Pharmacy Screen

When a TCT User navigates to the Assign/Change Pharmacy screen, the following enhancements will occur:

- Three new columns, titled 'Actions', 'Pharmacy Removed By', and 'Pharmacy Removed On', will be added to the Secondary and Primary Pharmacy Update History pop ups.
- Under the Actions column(s), an action button titled '**Remove**', will be viewable and clickable for the latest pharmacy assignment only.
- When a User clicks on the Remove button for the latest pharmacy assignment record(s), the following validation message will display:
 - Message: "Are you sure you want to remove the pharmacy Pharmacy ID – Pharmacy Name assignment?"
 - *The Pharmacy ID and Pharmacy Name values will be sourced from the respective fields on the Pharmacy Details screen.*
 - To close out of the validation message pop up, the User must click on one of the below buttons:
 - Confirm
 - If the User clicks on the 'Confirm' button, the latest pharmacy assignment(s) will then be removed from the Assign/Change Pharmacy screen.
 - The below fields, displaying on the Assign/Change Pharmacy screen, will no longer be visible as the latest pharmacy assignment(s) was successfully removed from the Secondary and/or Primary Pharmacy Update History pop up(s):
 - Secondary Site Code and Secondary Site Name
 - Primary Pharmacy Code and Primary Pharmacy Name
 - On the Secondary and/or Primary Pharmacy Update History pop up(s), the 'Pharmacy Removed By' column, for the latest pharmacy assignment record(s), will then indicate the Last Name, First Name of the User who successfully removed the pharmacy assignment(s).
 - *The pharmacy assignment record(s) will remain visible on the Secondary and/or Primary Pharmacy Update History pop ups, but the 'Remove' action button will no longer appear as the pharmacy assignment(s) was successfully removed.*
 - On the Secondary and/or Primary Pharmacy Update History pop up(s), the 'Pharmacy Removed On' column, for the latest pharmacy assignment record(s), will then indicate the Date and Timestamp the User successfully performed the pharmacy assignment(s) removal.
 - Cancel
 - If the User clicks on the 'Cancel' button, the latest pharmacy assignment(s) will continue to remain active/intact as no action was taken to remove the pharmacy assignment(s).
 - The below fields, displaying on the Assign/Change Pharmacy screen, will continue to be visible as the latest pharmacy assignment(s) was not removed from the Secondary and/or Primary Pharmacy Update History pop up(s).
 - Secondary Site Code and Secondary Site Name
 - Primary Pharmacy Code and Primary Pharmacy Name
 - On the Secondary and/or Primary Pharmacy Update History pop up(s), the 'Pharmacy Removed By' column, for the latest pharmacy assignment record(s), will display no value as the pharmacy assignment is still active.
 - On the Secondary and/or Primary Pharmacy Update History pop up(s), the 'Pharmacy Removed On' column, for the latest pharmacy assignment record(s), will display no value as the pharmacy assignment is still active.
 - For all other existing pharmacy assignment record(s), displaying on the Secondary and/or Primary Pharmacy Update History pop up(s), the 'Pharmacy Removed By' and 'Pharmacy Removed On' columns will display a double dash value (--) as the record(s) have been overwritten with the latest pharmacy assignment.
 - If a Client does not yet have a Primary Pharmacy assigned, the existing validation message pop ups will continue to display on the Assign/Change Pharmacy and Drug Regimen screens.
 - If a Client's Secondary and/or Primary Pharmacy is deactivated, the existing validation message pop up(s) will continue to display on the Assign/Change Pharmacy and Drug Regimen screens.

Feature Updates: Sprint 20

Pharmacy Removing Pharmacy Assignments on the Assign/Change Pharmacy Screen Cont.

'Actions', 'Pharmacy Removed By', and 'Pharmacy Removed On' Columns on Primary Pharmacy Update History Pop Up

Primary Pharmacy Update History

Updated By	Updated On	Pharmacy	Site Type	Pharmacy Address	City	Zip Code	Actions	Pharmacy Removed By	Pharmacy Removed On
admin, admin	09/17/2024 9:22 AM	781 - **DROP**Safemed Pharmacy	Primary participating Pharmacy	Duplicate To Pcy 810, Incorr Addy	Dallas	75228	Remove		--
admin, admin	09/17/2024 9:22 AM	905 - 15RX Pharmacy #2	Primary participating Pharmacy	11212 SH 151, Plaza 2, Ste. 110	San Antonio	78251	--		--

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 Showing rows 1 to 15 of 539

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>

>>

Close

'Actions', 'Pharmacy Removed By', and 'Pharmacy Removed On' Columns on Secondary Pharmacy Update History Pop Up

Secondary Pharmacy Update History

Updated By	Updated On	Pharmacy	Site Type	Pharmacy Address	City	Zip Code	Actions	Pharmacy Removed By	Pharmacy Removed On
admin, admin	09/17/2024 10:23 AM	476 - University Health Center Downtown Pharm.	Secondary Site	903 West Martin	San Antonio	78207	Remove		--

15

 Showing rows 1 to 15 of 20

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2

>

Close

Feature Updates: Sprint 20

Pharmacy Removing Pharmacy Assignments on the Assign/Change Pharmacy Screen Cont.

Pharmacy Assignment Removal Validation Message on Primary Pharmacy Update History Pop Up

Are you sure you want to remove the pharmacy 781 - ****DROP**Safemed**
Pharmacy assignment?

Confirm

Cancel

Pharmacy Assignment Removal Validation Message on Secondary Pharmacy Update History Pop Up

Are you sure you want to remove the pharmacy 476 - **University Health Center**
Downtown Pharm. assignment?

Confirm

Cancel

Feature Updates: Sprint 20

Pharmacy Removing Pharmacy Assignments on the Assign/Change Pharmacy Screen Cont.

Primary Pharmacy Code and Primary Pharmacy Name Values for Latest Pharmacy Assignment on Assign/Change Pharmacy Screen

Client ID:

Client Name:

Client DOB:

Primary Pharmacy Code: 781

Primary Pharmacy Name: **DROP**Safemed Pharmacy

Secondary Site Code: 476

Secondary Site Name: University Health Center
Downtown Pharm.

Pharmacy Search

Primary Pharmacy Search

Use this section to choose the primary pharmacy for normal medication ordering. This will be your regular pickup location. Only one Primary Pharmacy can be assigned at a time.

Primary Pharmacy Code

Primary Pharmacy Name ⓘ

Site Type

Select ⓘ

City

Zip Code

🕒 Primary Pharmacy Update History

🔍 Search

✕ Clear Search

Secondary Site Code and Secondary Site Name Values for Latest Pharmacy Assignment on Assign/Change Pharmacy Screen

Client ID:

Client Name:

Client DOB:

Primary Pharmacy Code: 781

Primary Pharmacy Name: **DROP**Safemed Pharmacy

Secondary Site Code: 476

Secondary Site Name: University Health Center
Downtown Pharm.

Pharmacy Search

Primary Pharmacy Search

Use this section to choose the primary pharmacy for normal medication ordering. This will be your regular pickup location. Only one Primary Pharmacy can be assigned at a time.

Primary Pharmacy Code

Primary Pharmacy Name ⓘ

Site Type

Select ⓘ

City

Zip Code

🕒 Primary Pharmacy Update History

🔍 Search

✕ Clear Search

Feature Updates: Sprint 20

Pharmacy Removing Pharmacy Assignments on the Assign/Change Pharmacy Screen Cont.

Primary Pharmacy Code and Primary Pharmacy Name Values After Latest Pharmacy Assignment Removal on Assign/Change Pharmacy Screen

Client ID:

Client Name:

Client DOB:

Secondary Site Code: 476

Secondary Site Name: University Health Center
Downtown Pharm.

Pharmacy Search

Primary Pharmacy Search

Use this section to choose the primary pharmacy for normal medication ordering. This will be your regular pickup location. Only one Primary Pharmacy can be assigned at a time.

Primary Pharmacy Code

Primary Pharmacy Name ⓘ

Site Type

Select

City

Zip Code

🕒 Primary Pharmacy Update History

🔍 Search

✕ Clear Search

Secondary Site Code and Secondary Site Name Values After Latest Pharmacy Assignment Removal on Assign/Change Pharmacy Screen

Client ID:

Client Name:

Client DOB:

Pharmacy Search

Primary Pharmacy Search

Use this section to choose the primary pharmacy for normal medication ordering. This will be your regular pickup location. Only one Primary Pharmacy can be assigned at a time.

Primary Pharmacy Code

Primary Pharmacy Name ⓘ

Site Type

Select

City

Zip Code

🕒 Primary Pharmacy Update History

🔍 Search

✕ Clear Search

Feature Updates: Sprint 20

Pharmacy Removing Pharmacy Assignments on the Assign/Change Pharmacy Screen Cont.

'Pharmacy Removed By' and 'Pharmacy Removed On' Values After Latest Pharmacy Assignment is Removed on Primary Pharmacy Update History Pop Up

Primary Pharmacy Update History

XWPDF

Updated By	Updated On	Pharmacy	Site Type	Pharmacy Address	City	Zip Code	Actions	Pharmacy Removed By	Pharmacy Removed On
admin, admin	09/17/2024 10:55 AM	781 - **DROP**Safemed Pharmacy	Primary participating Pharmacy	Duplicate To Pcy 810, Incorr Addy	Dallas	75228	--	admin, admin	09/17/2024 10:55 AM
admin, admin	09/17/2024 9:22 AM	905 - 15RX Pharmacy #2	Primary participating Pharmacy	11212 SH 151, Plaza 2, Ste. 110	San Antonio	78251	--		--

15 Showing rows 1 to 1 of 1

1Close

'Pharmacy Removed By' and 'Pharmacy Removed On' Values After Latest Pharmacy Assignment is Removed on Secondary Pharmacy Update History Pop Up

Secondary Pharmacy Update History

XWPDF

Updated By	Updated On	Pharmacy	Site Type	Pharmacy Address	City	Zip Code	Actions	Pharmacy Removed By	Pharmacy Removed On
admin, admin	09/17/2024 10:57 AM	476 - University Health Center Downtown Pharm.	Secondary Site	903 West Martin	San Antonio	78207	--	admin, admin	09/17/2024 10:57 AM

15 Showing rows 1 to 1 of 1

1Close

Feature Updates: Sprint 20

Pharmacy Removing Pharmacy Assignments on the Assign/Change Pharmacy Screen Cont.

- The same User Roles that have Read/Write access to the Assign/Change Pharmacy screen will have the pharmacy assignment Removal action on both the Secondary and Primary Pharmacy Update History pop ups:
 - HRAR Admin
 - DSHS Program Staff
 - Agency Client Services Supervisor / Manager
 - AA Data Managers
 - AA Program Staff
 - Agency Client Service Staff
- The below updates will occur to the Review Order screen (*regular order process and resubmission order processes*) when a User accesses an Order ID in Open(Started) and/or Shipped status(es) and proceeds with submitting the order:
 - Update the title of the existing Deactivated Pharmacies section to 'Unable to Submit Medications'.
 - Update the language of the existing subtext, found under the existing Deactivated Pharmacies section, to the below:
 - Subtext:** "The record(s) below cannot be submitted for the reason noted in the Reason column. Client must be assigned to an active pharmacy to order. No action is needed on the below record(s)."
 - Add a new column, titled 'Reason for Non-Submission', to the right of the existing Pharmacy ID column on the Unable to Submit Medication results table.
 - This column will display the record's pharmacy status:
 - Associated to a deactivated pharmacy.
 - No active pharmacy assigned.

Review Order Screen Updates for Open(Started) and/or Shipped Order Status(es)

Review Order

Please review the pharmacy details below prior to submitting the medication order for Active pharmacies only.

Active Pharmacies

Pharmacy ID	Site Usage Designation	Trade Name	Generic Name	Dosage Strength	Measure	Form	Day Supply	Quantity	Last Order Date	Medicaid/CHIP ID	Client ID	Client Name	D.O.B	Remove from Order?
There are no order line items for this order!														

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[Back](#) [Submit To Warehouse](#)

Unable to Submit Medications

The record(s) below cannot be submitted for the reason noted in the Reason column. Client must be assigned to an active pharmacy to order. No action is needed on the below record(s).

Pharmacy ID	Reason for Non-Submission	Site Usage Designation	Trade Name	Generic Name	Dosage Strength	Measure	Form	Day Supply	Quantity	Last Order Date	Medicaid/CHIP ID	Client ID	Client Name	D.O.B
97	Associated to a deactivated pharmacy	Both	BIKTARVY (30/60)	icetegravir/etriricabine/tenofovir alaf	50.200/25	--	TAB	30	1			143644	Yarbrough, Shonda	06/24/1972
97	Associated to a deactivated pharmacy	Both	BIKTARVY (30/60)	icetegravir/etriricabine/tenofovir alaf	50.200/25	--	TAB	30	1			259083	Romero Aguirre, Rafael	06/03/1987

Feature Updates: Sprint 20

Pharmacy Removing Pharmacy Assignments on the Assign/Change Pharmacy Screen Cont.

- The below updates will occur to the Order Transfer screen:
 - When a User searches for a Client ID via the 'Transfer Recipient ID', the System will check if the Client has an active pharmacy assigned or not. If the Client is identified as not having an active pharmacy assigned, the below message will display:
 - No active pharmacy assigned

Order Transfer Screen

Order Transfer Screen

Pharmacy ID	Trade Name	Generic Name	Dosage Strength	Measure	Form	Day Supply	Quantity	Quantity to be Transferred	Last Order Date	Client ID	Client Name	Transfer Recipient ID	Transfer Recipient Name	D.O.B
946	ZIDOVUDINE	Zidovudine (AZT)	300	MG	TAB	30	1	Quantity to be Transferred		104187	test, johnsaa	Q Search		07/31/1991

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Showing rows 1 to 1 of 1

← Back

⇌ Confirm Transfer

Order Transfer Screen Identifies Client ID with 'No active pharmacy assigned'

Transfer Client Search

Client ID ⓘ

Client Name

Message

105912

No active pharmacy assigned.

Search

Save

Cancel

Feature Updates: Sprint 20

Reports STAR Report Contracts Addition Enhancement

When a TCT User navigates to the STAR Report screen, the following enhancements will occur:

- A new check box selection, titled '**Contracts**', will now display beneath the STAR Parameters section.
- The Contracts check box selection will include the following sub-categories:
 - Contract Information
 - Service Information
- If a User selects the Contracts check box when curating the STAR Report and clicks on the 'Run Report' button, the report output will now include a new Contracts results table, above the current client data section, with the following column headers (*reading left to right*):
 - Agency Name
 - Agency Address
 - Contract Name
 - Contract Number
 - Contract Start Date
 - Contract End Date
 - Contract Amount
 - Contract UOS Goal
 - Contract UDC Goal
 - Expended
 - Primary Service Name
 - Secondary Service Name
 - Sub Service Name
 - Sub Service Default Price
 - Sub Service Budget
 - Subservice UOS Goal
 - Subservice UDC Goal

'Contracts' checkbox Under STAR Parameters Section

Statistical Analysis Report (STAR)

Statistical Analysis Report (STAR) - Parameters

☒ **Unduplicated Client Counts (included on all reports)**

- Total Clients Served
- New Clients Served
- Clients Served who Died during the Reporting Period

☐ **STU/Hepatitis**

- STU/Hepatitis: Number of Tests and Diagnoses

☐ **Basic Demographics**

- Age
- Gender
- Ethnicity
- Race

☐ **Tuberculosis**

- Tuberculosis: Number of Clients Screened during the period
- Tuberculosis: Number of Clients Screened since HIV diagnosis
- Tuberculosis: Number of PPDs Placed, Read and Results
- Tuberculosis: Number of IGRA and Results

☐ **Advanced Demographics**

- Country of Residence
- Living Situation

☐ **Medications**

- HAART Prescribed

☐ **Eligibility**

- Household Poverty Level
- Insurance Level

☐ **OB/GYN & Pregnancy**

- Cervical Pap Smears
- Anal Pap Smears
- Pregnancy

☐ **Basic Medical**

- HIV/AIDS Status

☐ **Screening**

- Screening Summary

☐ **Medical History**

- Most Recent CD4 Count
- Most Recent Viral Load Count

☐ **Services**

- Service Summary

☒ **Contracts**

- Contract Information
- Service Information

Feature Updates: Sprint 20

Reports STAR Report Contracts Addition Enhancement Cont.

- The associated System generated values, for the Contracts results table's column headers, will follow the below logic:
 - Each record will be a unique combination of the Contract Name, Primary Service Name, Secondary Service Name, and Subservice Name.
 - The applicable Contract values will be sourced from the information saved in the 'Contracts' tile.*
 - The Contracts results table will render the Contracts based on the selections made by the User when curating the STAR Report.
 - If the User selected a specific Contract Name, the Contracts results table will display record(s) for that particular Contract.*
 - If a User does not select a specific Contract, then all Contracts associated to the Agency/Funding Source will display in the Contracts results table.*
 - The Contracts results table will have the following export capabilities: Excel, Word, and PDF.
 - The Contracts results table will be paginated according to the amount of data rendered.
 - This enhancement is applicable to the STAR Report outputs, including:
 - Accessible View
 - Download PDF
- This enhancement is applicable to the Agency Portal only.

STAR Report Accessible View and Download PDF Actions

View STAR Reports

STAR Reports ⓘ

[Run New Report](#)

Report Name	File Name	Submitted Date	Status	Actions
STAR Report	StarReport_20240917045430316	9/17/2024 4:54:30 PM	Complete	Accessible View Download PDF Delete
STAR Report	StarReport_20240917044858502	9/17/2024 4:48:58 PM	Complete	Accessible View Download PDF Delete
STAR Report	StarReport_20240917021844888	9/17/2024 2:18:45 PM	Complete	Accessible View Download PDF Delete
STAR Report	StarReport_20240916022409969	9/16/2024 2:24:10 PM	Complete	Accessible View Download PDF Delete
STAR Report	StarReport_20240916021915546	9/16/2024 2:19:15 PM	Complete	Accessible View Download PDF Delete
STAR Report	StarReport_20240916121644746	9/16/2024 12:16:44 PM	Complete	Accessible View Download PDF Delete
STAR Report	StarReport_20240916114112863	9/16/2024 11:41:13 AM	Complete	Accessible View Download PDF Delete
STAR Report	StarReport_20240916112730298	9/16/2024 11:27:30 AM	Complete	Accessible View Download PDF Delete
STAR Report	StarReport_20240916092944558	9/16/2024 9:29:44 AM	Complete	Accessible View Download PDF Delete
STAR Report	StarReport_20240915022736696	9/15/2024 2:27:36 PM	Complete	Accessible View Download PDF Delete

Feature Updates: Sprint 20

Reports STAR Report Output Insurance Enhancements

When a TCT User navigates to the View STAR Reports screen, the following enhancements will occur:

- A new Insurance results table will now display/render on the Accessible View and Download PDF STAR Report outputs.
 - *The Insurance results tables will appear above the Contracts data section.*
- The Insurance results tables will include the following column headers and System generated values (*reading left to right*):
 - Client ID
 - This column will display the Client ID for the applicable Client record(s) rendered when generating the STAR Report.
 - Client Name
 - This column will display the Last Name, First Name for the applicable Client record(s) rendered when generating the STAR Report.
 - D.O.B
 - This column will display the Date of Birth for the applicable Client record(s) rendered when generating the STAR Report.
 - Status
 - This column will display the Status for the applicable Client record(s) rendered when generating the STAR Report.
 - Values: Inactive, Active
 - Program
 - This column will display the Program(s) the Client is approved for, appearing as comma separated, for the applicable Client record(s) rendered when generating the STAR Report.
 - Values: THMP and/or CARE
 - Subprogram
 - This column will display the Subprograms(s) the Client is approved for, appearing as comma separated, for the applicable Client record(s) rendered when generating the STAR Report.
 - Values: ADAP, SPAP, TIAP, MAI, and/or RW CARE
 - Insurance Type
 - This column will display the Insurance Type(s), saved on the Insurance Information screen of a Client's Profile, appearing as separate rows/records, for the applicable Client record(s) rendered when generating the STAR Report.
 - *The Insurance Type value(s) will be sourced from the 'Insurance Details' multi-select drop down.*

Feature Updates: Sprint 20

Reports STAR Report Output Insurance Enhancements Cont.

- This column will display the following Insurance Type value(s):
 - ACA Marketplace Plans
 - CHIP
 - COBRA
 - County Indigent Health Plan
 - I Do Not Currently Have Health Insurance or Have Lost My Insurance More Than 90 Days Ago
 - I Don't Know
 - Medicaid
 - Medicare
 - Medicare Part D
 - Other Comprehensive Healthcare Plans
 - Patient Assistance Programs (PAPs)
 - Private/Employer Insurance or Veteran's Affairs (VA) Insurance
- This column will display the Insurance Type value(s) as separate rows/records if more than 1 insurance type is saved in a Client's Profile and will indicate the same Client ID.
- If no insurance type is saved in a Client's Profile, the Insurance Type column will display a double dash (--).
 - *This is because the 'Insurance Details' multi-select drop down is an optional field.*
- The Insurance Type value(s) will be System generated and will be non-editable.
- Insurance Name
 - This column will display the Insurance Name(s) saved on the Insurance Information screen of a Client's Profile.
 - The Insurance Name value(s) will be sourced from the 'Medical Insurance Name' single-select drop down(s).
 - The 'Medical Insurance Name' mapping is applicable to the following insurance types:
 - ACA Marketplace Plans
 - CHIP
 - COBRA
 - Private/Employer Insurance or Veteran's Affairs (VA) insurance
 - Medicaid
 - Medicare
 - Medicare Part D

Feature Updates: Sprint 20

Reports STAR Report Output Insurance Enhancements Cont.

- Per the enhancement, for the COBRA insurance type, we will be updating the pre-existing Insurance Name single-select drop down, found on the Insurance Information screen, to 'Medical Insurance Name'.
 - Per the enhancement, for the Private Employer/Veteran's Affairs insurance type, will be updating the picklist values for the existing Medical Insurance Name single-select drop down to read the same values from the 'Insurance Name' single-select drop down on the Application Workflow.
 - *All other 'Medical Insurance Name' picklist values will remain as-is for all other insurance types.*
 - This column will display the Insurance Name value(s) as separate rows/records for the applicable insurance type(s) saved in a Client's Profile.
 - *If the saved insurance type captured in a Client's Profile is not applicable to ACA, CHIP, COBRA, Private Employer/Veteran's Affairs, Medicaid, Medicare, and/or Medicare Part D, the Insurance Name column will display a double dash (--).*
 - If no insurance type exists for the Client in the Client's Profile, the Insurance Name column will display a double dash (--).
 - The insurance Name value(s) will be System generated and will be non-editable.
- Plan ID
 - This column will display the Plan ID sourced from the 'Plan ID' free text field, found on the Insurance Information screen, for the following insurance types:
 - ACA Marketplace Plans
 - COBRA
 - Private/Employer or Veteran's Affairs (VA) Insurance
 - Medicaid
 - Medicare
 - Medicare Part D
 - Per the enhancement, for the Medicaid insurance type, we will be adding a 'Plan ID' free text field on the Insurance Information screen.
 - Per the enhancement, for the Private Employer/Veteran's Affairs insurance type, we will be adding a 'Plan ID' free text field on the Insurance Information screen.
 - This column will display the Plan ID value(s) as separate rows/records for the applicable insurance type(s) saved in a Client's Profile.
 - If no insurance type exists for the Client in the Client's Profile, the Plan ID column will display a double dash (--).
 - The Plan ID value(s) will be System generated and will be non-editable.

Feature Updates: Sprint 20

Reports STAR Report Output Insurance Enhancements Cont.

- CHIP ID
 - This column will display the CHIP ID sourced from the 'CHIP ID' free text field, found on the Insurance Information screen, for the following insurance type:
 - CHIP
 - If no CHIP insurance type exists for the Client in the Client's Profile, the CHIP ID column will display a double dash (--).
 - The CHIP ID value will be System generated and will be non-editable.
- Medicare Number
 - This column will display the Medicare Number, sourced from the 'Medicare Number' free text field, found on the Insurance Information screen, for the following insurance types:
 - Medicare
 - Medicare Part D
 - This column will display the Medicare Number value(s) as separate rows/records for the applicable insurance type(s) saved in a Client's Profile.
 - If no insurance type exists for the Client in the Client's Profile, the Medicare Number column will display a double dash (--).
 - The Medicare Number value(s) will be System generated and will be non-editable.
- Medicaid ID
 - This column will display the Medicaid ID, sourced from the 'Medicaid ID' free text field, found on the Insurance Information screen, for the following insurance type:
 - Medicaid
 - If no insurance type exists for the Client in the Client's Profile, the Medicaid ID column will display a double dash (--).
 - The Medicaid ID value will be System generated and will be non-editable.
- Insurance Start Date
 - This column will display the Insurance Start Date(s), sourced from the 'Start Date' calendar fields, found on the Insurance Information screen, for the following insurance type(s):
 - ACA or Marketplace Plans
 - CHIP
 - COBRA
 - County indigent Health Plan
 - Medicaid
 - Medicare
 - Medicare Part D
 - Other Comprehensive Healthcare Plans
 - Patient Assistance Programs (PAPs)
 - Private/Employer Insurance or Veteran's Affairs (VA) Insurance
 - This column will display the Insurance Start Date(s) as separate rows/records for the applicable insurance type(s) saved in a Client's Profile
 - If no insurance type exists for the Client in the Client's Profile, the Insurance Start Date column will display a double dash (--).
 - The Insurance Start Date value(s) will be System generated and will be non-editable.

Feature Updates: Sprint 20

Reports STAR Report Output Insurance Enhancements Cont.

- Insurance End Date
 - This column will display the Insurance End Date(s), sourced from the 'End Date' calendar fields, found on the Insurance Information screen, for the following insurance type(s):
 - ACA or Marketplace Plans
 - CHIP
 - COBRA
 - County indigent Health Plan
 - Medicaid
 - Medicare
 - Medicare Part D
 - Other Comprehensive Healthcare Plans
 - Patient Assistance Programs (PAPs)
 - Private/Employer Insurance or Veteran's Affairs (VA) Insurance
 - This column will display the insurance End Date(s) as separate rows/records for the applicable insurance type(s) saved in a Client's Profile
 - If no insurance type exists for the Client in the Client's Profile, the Insurance End Date column will display a double dash (--).
 - The Insurance End Date value(s) will be System generated and will be non-editable.
- The Insurance results table will display the applicable Client insurance record(s) based on the STAR Report search criteria selected when curating the report.
- The Accessible View insurance result table will have the following export capabilities:
 - Excel
 - Word
 - PDF
- This enhancement is applicable to the Agency Portal only.

Insurance Results Table on STAR Report Accessible View

Client ID	Client Name	D.O.B	Status	Program	Subprogram	Insurance Type	Insurance Name	Plan ID	CHIP ID	Medicare Number	Medicaid ID	Insurance Start Date	Insurance End Date
			Active	--	--	Medicaid	--	--	--	--	528647523	03/01/2023	--
			Active	--	--	Other comprehensive healthcare plans	--	--	--	--	--	01/01/2024	12/31/2024
			Active	--	--	Medicaid	--	--	--	--	--	04/01/2023	03/31/2024
			Active	CARE	RWCARE	Medicaid	--	--	--	--	--	--	--
			Active	CARE	RWCARE	Medicaid	--	--	--	--	--	01/01/2021	12/31/2021
			Active	THMP	ADAP	--	--	--	--	--	--	--	--
			Active	THMP,CARE	ADAP,RWCARE	--	--	--	--	--	--	--	--
			Active	--	--	Medicaid	Texas Children's Health Plan	--	--	--	530207998	10/01/2015	--
			Active	--	--	Medicaid	--	--	--	--	--	08/01/2022	07/31/2023
			Active	--	--	Medicaid	--	--	--	--	--	--	--
			Active	--	--	Medicaid	--	--	--	--	--	--	--
			Active	THMP	ADAP	--	--	--	--	--	--	--	--
			Active	CARE	MAI	ACA or Marketplace Plans	--	--	--	--	--	--	--

Feature Updates: Sprint 20

Reports STAR Report Export Enhancements

When a TCT User navigates to the View STAR Reports screen, the following enhancements will occur:

- The Accessible View and Download PDF actions, found under the 'Actions' column, will display the below two columns above the current Unduplicated Clients results tables:
 - Criteria
 - This column header will display all STAR Report search criteria as separate rows, including:
 - Basic Demographics
 - Advanced Demographics
 - Eligibility
 - Basic Medical
 - Medical History
 - STI/Hepatitis
 - Tuberculosis
 - Medications
 - OB/GYN & Pregnancy
 - Screening
 - Services
 - Service Start Date
 - Service End Date
 - Agency or Administrative Agency
 - Funding Source
 - Contract
 - Primary Service
 - Client Age Range Start
 - Client Age Range End
 - Gender
 - WICY Clients Only
 - Client Race
 - Household Poverty Level Start
 - Household Poverty Level End
 - County
 - Client Status

Feature Updates: Sprint 20

Reports STAR Report Export Enhancements Cont.

- Selected Value
 - This column header will display the value(s) indicated by the User for the specific search criteria category(ies) selected.
 - For example, if the User checks off the Basic Demographics category, the 'Age', 'Gender', 'Ethnicity', and 'Race' sub-category values will populate by default under the Selected Value column.
 - If multiple values are indicated by the User for a specific search criteria category, the values will appear as comma separated.
 - If the User checks off the 'WICY Reports Clients Only' selection, the Selected Value column will display the 'Include' value.
 - If a particular search criteria is not selected when curating the STAR Report, the Selected Value column will display a double dash (--).
- The Criteria and Selected Value results tables will have the following export capabilities: Excel, Word, and PDF.
- This enhancement is applicable to the Accessible View and Download PDF actions of the STAR Report.
- This enhancement is applicable to the Agency Portal only.

Accessible View and Download PDF Actions on View STAR Reports Screen

View STAR Reports

STAR Reports ⓘ

Run New Report

Report Name	File Name	Submitted Date	Status	Actions
STAR Report	StarReport_20240915022736696	9/15/2024 2:27:36 PM	Complete	Accessible ViewDownload PDFDelete
STAR Report	StarReport_20240913102940655	9/13/2024 10:29:40 AM	Complete	Accessible ViewDownload PDFDelete
STAR Report	StarReport_20240912110221166	9/12/2024 11:02:21 AM	Complete	Accessible ViewDownload PDFDelete
STAR Report	StarReport_20240912103420219	9/12/2024 10:34:20 AM	Complete	Accessible ViewDownload PDFDelete
STAR Report	StarReport_20240912095730526	9/12/2024 9:57:30 AM	Complete	Accessible ViewDownload PDFDelete
STAR Report	StarReport_20240912093927552	9/12/2024 9:39:27 AM	Complete	Accessible ViewDownload PDFDelete
STAR Report	StarReport_20240912091334090	9/12/2024 9:13:34 AM	Complete	Accessible ViewDownload PDFDelete
STAR Report	StarReport_20240912090905625	9/12/2024 9:09:05 AM	Complete	Accessible ViewDownload PDFDelete
STAR Report	StarReport_20240912090653767	9/12/2024 9:06:53 AM	Complete	Accessible ViewDownload PDFDelete
STAR Report	StarReport_20240911092607702	9/11/2024 9:26:07 PM	Complete	Accessible ViewDownload PDFDelete

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Showing rows 1 to 10 of 302

12345>>>

Feature Updates: Sprint 20

Reports STAR Report Export Enhancements Cont.

'Criteria' and 'Selected Value' Columns on Accessible View STAR Report Output

← Back to Reports

Statistical Analysis Report (STAR)
4800 - Texas Department of State Health Services
Reporting Period: 09/06/2023 to 09/15/2024

Criteria	Selected Value
Basic Demographics	...
Advanced Demographics	...
Eligibility	...
Basic Medical	HIV/AIDS Status
Medical History	...
STU/hepatitis	...
Tuberculosis	...
Medications	...
OB/GYN & Pregnancy	...
Screening	...
Services	...
Service Start Date	09/06/2023
Service End Date	09/15/2024
Agency or Administrative Agency	4800 - Texas Department of State Health Services
Funding Source	Ryan White Part A
Contract	...
Primary Service	...
Client Age Range Start	...
Client Age Range End	...
Gender	...
WIC/ Clients Only	...
Client Race	...
Household Poverty Level Start	...
Household Poverty Level End	...
County	...
Client Status	...

Criteria selected when report was generated.

Feature Updates: Sprint 20

Reports STAR Report Export Enhancements Cont.

'Criteria' and 'Selected Value' Columns on Download PDF STAR Report Output

Statistical Analysis Report (STAR)	
4801 - Panhandle AIDS Support Organization	
Reporting Period:01/01/2024 to 09/13/2024	
Criteria	Selected Value
Basic Demographics	
Advanced Demographics	
Eligibility	
Basic Medical	HIV/AIDS Status
Medical History	
STI/Hepatitis	
Tuberculosis	
Medications	
OB/GYN & Pregnancy	
Screening	
Services	Service Summary
Service Start Date	01/01/2024
Service End Date	09/13/2024
Agency or Administrative Agency	4801 - Panhandle AIDS Support Organization
Funding Source	FEMA 1500000553, Day Care, Medications, Volunteer, Non RW Services, PASO Unrestricted, Ryan White Part B, Ryan White Part B Supplemental, State GF, State GF-R, HOPWA
Contract	
Primary Service	
Client Age Range Start	
Client Age Range End	
Gender	
WICY Clients Only	
Client Race	
Household Poverty Level Start	
Household Poverty Level End	
County	
Client Status	

Feature Updates: Sprint 20

Reports CARE Plan Task Report

When a TCT User navigates to the TCT Reports via the Agency Portal, the following enhancements will occur:

- A new report, titled '**CARE Plan Task Report**', will now display beneath the Reports drop down on the left navigation pane.
 - The hyperlinked report will route the User to the CARE Plan Task Report screen.
 - The CARE Plan Task Report values will be sourced from the CARE Plan screen of a Client's Profile.
- The CARE Plan Task Report will be accessible to the below User Roles:
 - HRAR Admin
 - DSHS Program Staff
 - Agency Client Services Supervisor / Manager
 - AA Data Manager
 - AA Program Staff
 - Agency Client Service Staff
- The CARE Plan Task Report screen will have the following search criteria:
 - Agency
 - This will be a mandatory, multi-select drop down of all active Provider Agencies in the TCT System.
 - The Agency values will be sourced from the Agency Selection screen.
 - When an Agency Client Services Supervisor / Manager, AA Data Manager, and/or AA Program Staff User is curating the CARE Plan Task Report, the Agency drop down will only render Provider Agencies associated to that User.
 - When an HRAR Admin or DSHS Program Staff User is curating the CARE Plan Task Report, the Agency drop down will render all Provider Agencies in the TCT System.
 - The Agency drop down will include the 'All' selection for Agency Client Services Supervisor / Manager, AA Data Manager, Agency Client Service Staff, and/or AA Program Staff Users when curating the report.
 - Client ID
 - This will be an optional, free-text field accepting numeric values only.

Feature Updates: Sprint 20

Reports CARE Plan Task Report Cont.

- Plan Status
 - This will be an optional, single-select drop down with the following values available for selection:
 - Complete
 - In Progress
 - No Longer Applicable
- Intervention Assigned To
 - This will be an optional, single-select drop down with the following values available for selection:
 - TCT User
 - Other
- TCT User Intervention Assignee
 - This will be an optional, single-select drop down rendering the Staff Login IDs associated to the Agency(ies) selected.
- Other Intervention Assignee
 - This will be an optional, free-text field accepting alphanumeric values with a maximum character limit of 25.
- Start Date
 - This will be an optional, calendar field mapped to the 'Start Date' of the intervention.
- End Date
 - This will be an optional, calendar field mapped to the 'Target Date' of the intervention.
- The CARE Plan Task Report screen will render the following column headers and System generated values in the results table upon the user clicking on the 'Search' button:
 - Client ID
 - The rendered Client ID will be hyperlinked to take the User to the Client's Dashboard.
 - CARE Plan Goal Name
 - This column will display the value, sourced from the 'CARE Plan Goal Name' field, on the Add CARE Plan pop up of a Client's Profile.

Feature Updates: Sprint 20

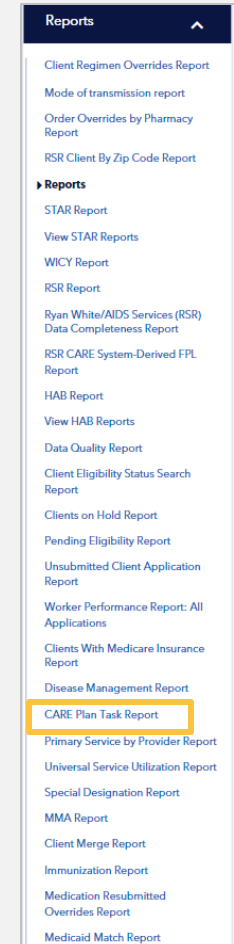
Reports CARE Plan Task Report Cont.

- Problem Statement
 - This column will display the value, sourced from the 'Problem Statement (Need)' field, on the Add CARE Plan pop up of a Client's Profile.
- Plan Status
 - This column will display the value, sourced from the 'Status' field, on the Add CARE Plan pop up of a Client's Profile.
- Intervention Name
 - This column will display the value sourced, from the 'Intervention' field, on the Add Intervention pop up of a Client's Profile.
- Intervention Priority
 - This column will display the value, sourced from the 'Priority' field, on the Add Intervention pop up of a Client's Profile.
- Intervention Assigned To
 - This column will display the value, sourced from the 'Assigned To' field, on the Add Intervention pop up of a Client's Profile.
- TCT User Intervention Assignee
 - This column will display the value, sourced from the 'TCT User' field, on the Add Intervention pop up of a Client's Profile.
 - *This field will only populate when the 'TCT User' option is selected in the Assigned To field.*
- Other Intervention Assignee
 - This column will display the value, sourced from the 'Other' field, on the Add Intervention pop up of a Client's Profile.
 - *This field will only populate when the 'Other' option is selected in the Assigned To field.*
- Intervention Status
 - This column will display the value, sourced from the 'Status' field, on the Add Intervention pop up of a Client's Profile.
- Intervention Start Date
 - This column will display the value, sourced from the 'Start Date' field, on the Add Intervention pop up of a Client's Profile.
- Intervention Target Date
 - This column will display the value, sourced from the 'Target Date' field, on the Add Intervention pop up of a Client's Profile.
- Intervention Check-In Date
 - This column will display the value, sourced from the 'Check-In Date' field, on the Add Intervention pop up of a Client's Profile.

Feature Updates: Sprint 20

Reports CARE Plan Task Report Cont.

- Intervention Outcome
 - This column will display the value, sourced from the 'Outcome' field, on the Add Intervention pop up of a Client's Profile.
- Intervention Outcome Date
 - This column will display the value, sourced from the 'Outcome Date' field, on the Add Intervention pop up of a Client's Profile.
- Intervention Last Updated By
 - This column will display the value, sourced from the 'Updated By' field, on the Add Intervention pop up of a Client's Profile.
- Intervention Last Updated On
 - This column will display the value, sourced from the 'Last Updated' field, on the Add Intervention pop up of a Client's Profile.
 - Format: MM/DD/YYYY
- Intervention Notes
 - This column will display the values, sourced from the 'Notes' field, on the Add Intervention pop up of a Client's Profile.
- The CARE Plan Task Report will have the following export capabilities: Excel, Word, and PDF.
- This enhancement is applicable to the Agency Portal only.



Feature Updates: Sprint 20

Reports CARE Plan Task Report Cont.

CARE Plan Task Report Screen

Care Plan Task Report

Care Plan Task Report - Filters

Agency *

4802 - Basin Assistance Services

Client ID

Plan Status

In Progress

Intervention Assigned To

TCT User

TCT User Intervention Assignee

00000265679

Other Intervention Assignee

Select

Start Date

MM/DD/YYYY

Target Date

MM/DD/YYYY

Search

Clear

Excel

Word

PDF

Client ID	Care Plan Goal Name	Problem Statement	Plan Status	Intervention Name	Intervention Priority	Intervention Assigned To	TCT User Intervention Assignee	Other Intervention Assignee	Intervention Status	Intervention Start Date	Intervention Target Date	Intervention Check-in Date	Intervention Outcome	Intervention Outcome Date	Intervention Last Updated	Intervention Updated By	Intervention Notes
			--		--	Other	--	1	--	05/05/2005	05/09/2005	--		--	07/21/2023		
			--		--	Other	--	1	--	08/29/2005	11/29/2005	--	used transportation	--	07/21/2023		
			--		--	Other	--	0	--	03/21/2005	03/21/2005	--	COMPLETE	--	07/21/2023		
			--		--	Other	--	0	--	03/21/2005	03/21/2005	--	COMPLETE	--	07/21/2023		
			--		--	Other	--	1	--	01/23/2006	04/23/2006	--		--	07/21/2023		
			--		--	Other	--	0	--	12/28/2006	01/08/2007	--	completed	--	07/21/2023		
			--		--	Other	--	1	--	12/28/2006	01/08/2007	--	completed	--	07/21/2023		
			--		--	Other	--	1	--	12/28/2006	02/25/2007	--	completed	--	07/21/2023		
			--		--	Other	--	0	--	12/28/2006	06/01/2007	--	Cancelled	--	07/21/2023		
			--		--	Other	--	0	--	12/28/2006	06/01/2007	--	Cancelled	--	07/21/2023		
			--		--	Other	--	1	--	06/28/2007	11/01/2007	--	No Show	--	07/21/2023		
			--		--	Other	--	1	--	01/08/2007	02/22/2007	--	accessed	--	07/21/2023		

Feature Updates: Sprint 20

Reports CARE Plan Task Report Cont.

CARE Plan Task Report Output

AutoSave Off

data_export (5).xlsx Select a Label Saved to this PC

Search

Davis, Alex

File Home Insert Draw Page Layout Formulas Data Review View Automate Deloitte Tools Help Acrobat

Paste

Clipboard

Calibri 12 A A

Font

General

Conditional Formatting

Format as Table

Cell Styles

Styles

Insert

Delete

Format

Cells

Σ ZY

Editing

Analyze Data

Sensitivity

Add-ins

Create and Share Adobe PDF

Adobe Acrobat

Comments Share

A1 Client ID

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
1	Client ID	Care Plan	C Problem St	Plan Status	Interventio	Interventio	Interventio	TCT User	In	Other	Inter	Interventio	Interventio	Interventio	Interventio	Interventio	Interventio	Intervention	Notes										
2							Other	--	1	--	05/05/2001	05/09/2001	--							07/21/2023									
3							Other	--	1	--	08/29/2001	11/29/2001	--							07/21/2023									
4							Other	--	0	--	03/21/2001	03/21/2001	--							07/21/2023									
5							Other	--	0	--	03/21/2001	03/21/2001	--							07/21/2023									
6							Other	--	1	--	01/23/2004	04/23/2004	--							07/21/2023									
7							Other	--	0	--	12/28/2004	01/08/2001	--							07/21/2023									
8							Other	--	1	--	12/28/2004	01/08/2001	--							07/21/2023									
9							Other	--	1	--	12/28/2004	02/25/2001	--							07/21/2023									
10							Other	--	0	--	12/28/2004	06/01/2001	--							07/21/2023									
11							Other	--	0	--	12/28/2004	06/01/2001	--							07/21/2023									
12							Other	--	1	--	06/28/2001	11/01/2001	--							07/21/2023									
13							Other	--	1	--	01/08/2001	02/22/2001	--							07/21/2023									
14							Other	--	1	--	03/29/2001	04/03/2001	--							07/21/2023									
15							Other	--	1	--	01/08/2001	02/06/2001	--							07/21/2023									
16							Other	--	1	--	01/08/2001	01/24/2001	--							07/21/2023									
17							Other	--	1	--	01/08/2001	01/22/2001	--							07/21/2023									
18							Other	--	1	--	01/08/2001	02/08/2001	--							07/21/2023									
19							Other	--	1	--	01/08/2001	02/08/2001	--							07/21/2023									
20							Other	--	0	--	01/02/2001	01/16/2001	--							07/21/2023									
21							Other	--	1	--	01/12/2001	03/05/2001	--							07/21/2023									
22							Other	--	1	--	03/30/2001	06/30/2001	--							07/21/2023									
23							Other	--	0	--	03/30/2001	03/30/2001	--							07/21/2023									
24							Other	--	1	--	03/30/2001	09/30/2001	--							07/21/2023									
25							Other	--	1	--	03/30/2001	06/30/2001	--							07/21/2023									
26							Other	--	1	--	03/30/2001	06/30/2001	--							07/21/2023									
27							Other	--	0	--	04/30/2001	06/19/2001	--							07/21/2023									
28							Other	--	0	--	04/30/2001	06/19/2001	--							07/21/2023									
29							Other	--	0	--	04/30/2001	06/19/2001	--							07/21/2023									
30							Other	--	0	--	04/30/2001	05/21/2001	--							07/21/2023									
31							Other	--	1	--	07/05/2001	08/05/2001	--							07/21/2023									
32							Other	--	1	--	07/05/2001	08/05/2001	--							07/21/2023									
33							Other	--	1	--	01/18/2001	01/21/2001	--							07/21/2023									

Sheet1

Ready Accessibility: Good to go

Display Settings 60%

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Feature Updates: Sprint 20

Reports Ad Hoc Report Pharmacy Table and Column Name Enhancements

When a TCT User navigates to the Ad Hoc Query Builder, the following enhancements will occur:

- After selecting the 'Contracts, Services, Client Medical and Risk' Data Source, the following Table Name categories will be available for selection on the Table and Column Details screen via the 'Add Record' button:
 - Client Medication Orders
 - Client Medication Order Override
 - Client Regimen
 - Client Regimen Override
 - Shipment Resubmission Overrides

Client Regimen and Client Regimen Override Table Name Selections

The screenshot shows a modal window titled "Add Table Column Detail Record". Inside, there is a "Table Name" dropdown menu that is open, showing a list of table names. The list includes "Client Regimen" and "Client Regimen Override", which are highlighted with a yellow box. Other visible table names include "Client Service Tracking", "Client Side Effect", "Client Special Need", "Client STI/HP Detail", "Client TB Detail", "Client Viral Load Details", "Contract", "Contract Service", "Contract Sub Service", "Drug Regimen", "Organization", "Psychosocial Factors Assessment", "Risk Depression Screening", "Risk Mental Health Screening", "Risk Mental Health Screening Treatment", "Risk Reduction Screening", "Risk Substance Use Screening", "Risk Substance Use Screening Treatment", "SAMISS Assessment", and "Shipment Resubmission Overrides". The "Add Record" and "Cancel" buttons are visible at the bottom right of the modal.

Client Medication Orders and Client Medication Order Override Table Name Selections

The screenshot shows a modal window titled "Add Table Column Detail Record". Inside, there is a "Table Name" dropdown menu that is open, showing a list of table names. The list includes "Client Medication Orders" and "Client Medication Order Override", which are highlighted with a yellow box. Other visible table names include "Client Service Tracking", "Client Side Effect", "Client Special Need", "Client STI/HP Detail", "Client TB Detail", "Client Viral Load Details", "Contract", "Contract Service", "Contract Sub Service", "Drug Regimen", "Organization", "Psychosocial Factors Assessment", "Risk Depression Screening", "Risk Mental Health Screening", "Risk Mental Health Screening Treatment", "Risk Reduction Screening", "Risk Substance Use Screening", "Risk Substance Use Screening Treatment", "SAMISS Assessment", and "Shipment Resubmission Overrides". The "Add Record" and "Cancel" buttons are visible at the bottom right of the modal.

Shipment Resubmission Overrides Table Name Selection

The screenshot shows a modal window titled "Add Table Column Detail Record". Inside, there is a "Table Name" dropdown menu that is open, showing a list of table names. The list includes "Shipment Resubmission Overrides", which is highlighted with a yellow box. Other visible table names include "Client Service Tracking", "Client Side Effect", "Client Special Need", "Client STI/HP Detail", "Client TB Detail", "Client Viral Load Details", "Contract", "Contract Service", "Contract Sub Service", "Drug Regimen", "Organization", "Psychosocial Factors Assessment", "Risk Depression Screening", "Risk Mental Health Screening", "Risk Mental Health Screening Treatment", "Risk Reduction Screening", "Risk Substance Use Screening", "Risk Substance Use Screening Treatment", "SAMISS Assessment", and "Shipment Resubmission Overrides". The "Add Record" and "Cancel" buttons are visible at the bottom right of the modal.

Feature Updates: Sprint 20

Reports Ad Hoc Report Pharmacy Table and Column Name Enhancements Cont.

- When a User selects the 'Client Medication Orders' Table Name option, the following picklist values will display under the Column Name:

- Client ID
- Client Name
- Client D.O.B
- Order ID
- Order Status
- Order Validation Message
- Order Shipping Status
- Trade Name
- Generic Name
- Dosage Strength
- Measure
- Form
- Count As
- Day Supply
- Quantity
- Last Order Date
- Medicaid/CHIP ID
- Shipped Date
- Tracking Number
- Dispensed Date
- Medication Shipment Received
- Medication Received Date
- Pharmacy ID
- Pharmacy Name
- Medication Order Created By
- Medication Order Created On
- Medication Order Submitted By
- Medication Order Submitted On

Client Medication Orders Column Name Values

The screenshot shows a web application interface for adding a table column detail record. The form has two main sections: 'Table Name' and 'Column Name'. The 'Table Name' dropdown is set to 'Client Medication Orders'. The 'Column Name' dropdown is open, displaying a list of available column names. The list includes 'Select', 'Client D.O.B', 'Client ID', 'Client Name', 'Day Supply', and 'Dispensed Date'. The 'Client D.O.B' option is currently selected and highlighted in blue.

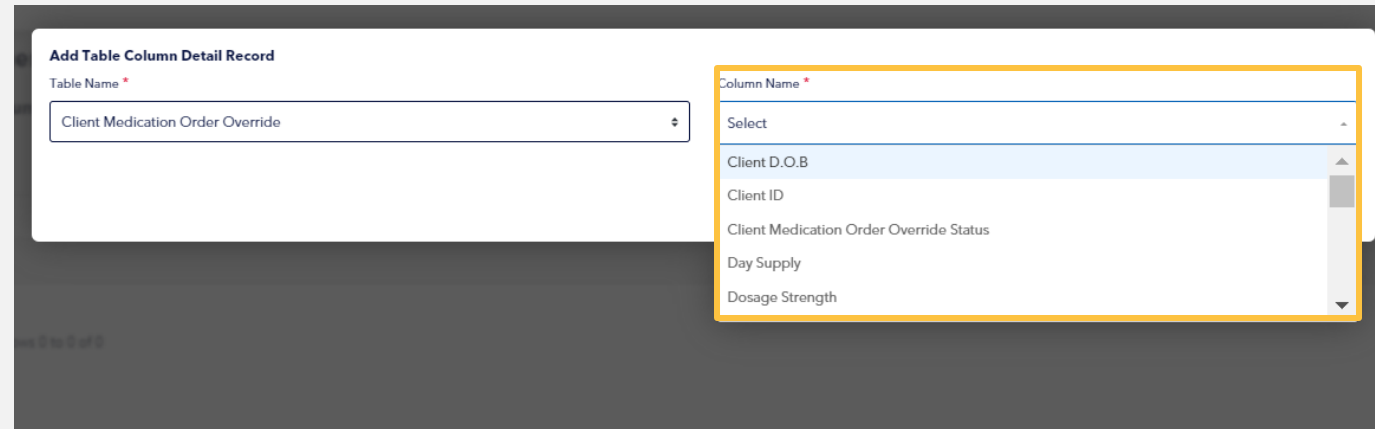
Table Name *	Column Name *
Client Medication Orders	Select
	Client D.O.B
	Client ID
	Client Name
	Day Supply
	Dispensed Date

Feature Updates: Sprint 20

Reports Ad Hoc Report Pharmacy Table and Column Name Enhancements Cont.

- When a User selects the '**Client Medication Order Override**' Table Name option, the following picklist values will display under the Column Name:
 - Client ID
 - Client Name
 - Client D.O.B
 - Trade Name
 - Generic Name
 - Dosage Strength
 - Measure
 - Form
 - Day Supply
 - Quantity
 - Last Order Date
 - Order Override Denial Reason
 - Reason for Order Override
 - Client Medication Order Override Status
 - Pharmacy ID
 - Pharmacy Name
 - Medication Order Override Submitted By
 - Medication Order Override Submitted On
 - Medication Order Override Decision By
 - Medication Order Override Decision On

Client Medication Order Override Column Name Values



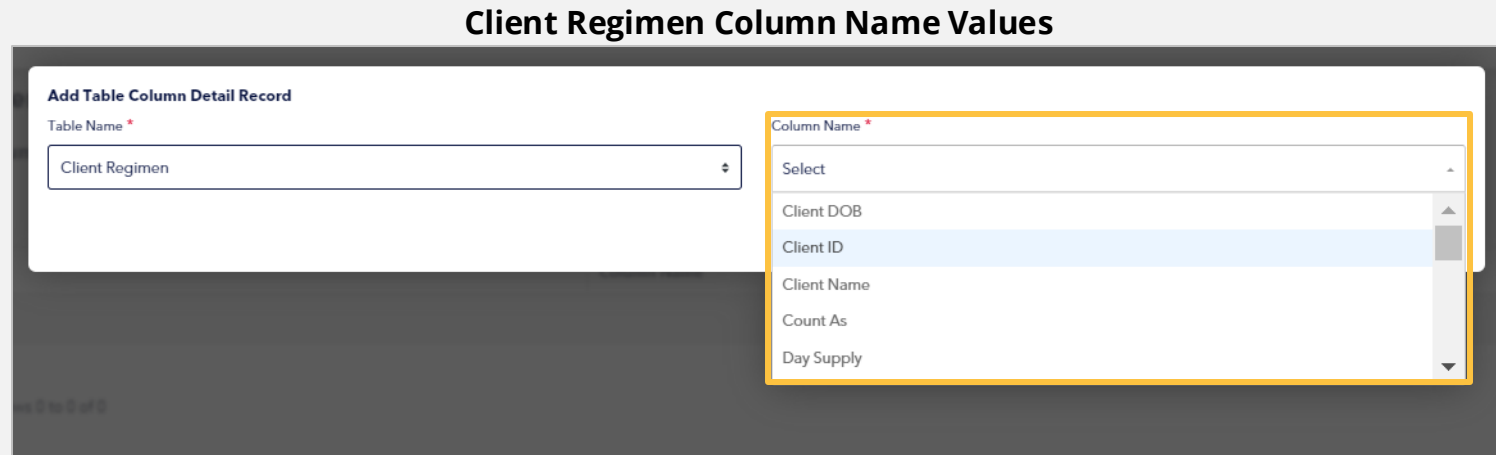
The screenshot displays a web form titled "Add Table Column Detail Record". It contains two dropdown menus. The "Table Name" dropdown is set to "Client Medication Order Override". The "Column Name" dropdown is open, showing a list of available columns: "Select", "Client D.O.B", "Client ID", "Client Medication Order Override Status", "Day Supply", and "Dosage Strength".

Feature Updates: Sprint 20

Reports Ad Hoc Report Pharmacy Table and Column Name Enhancements Cont.

- When a User selects the '**Client Regimen**' Table Name option, the following picklist values will display under the Column Name:
 - Client ID
 - Client Name
 - Client D.O.B
 - Drug Code
 - Trade Name
 - Generic Name
 - Dosage Strength
 - Measure
 - Form
 - Count As
 - Day Supply
 - Min Day Supply
 - Dosage Frequency
 - Regimen Status
 - New to Client?
 - Pharmacy ID
 - Pharmacy Name
 - Medication Added By
 - Medication Added On

Client Regimen Column Name Values



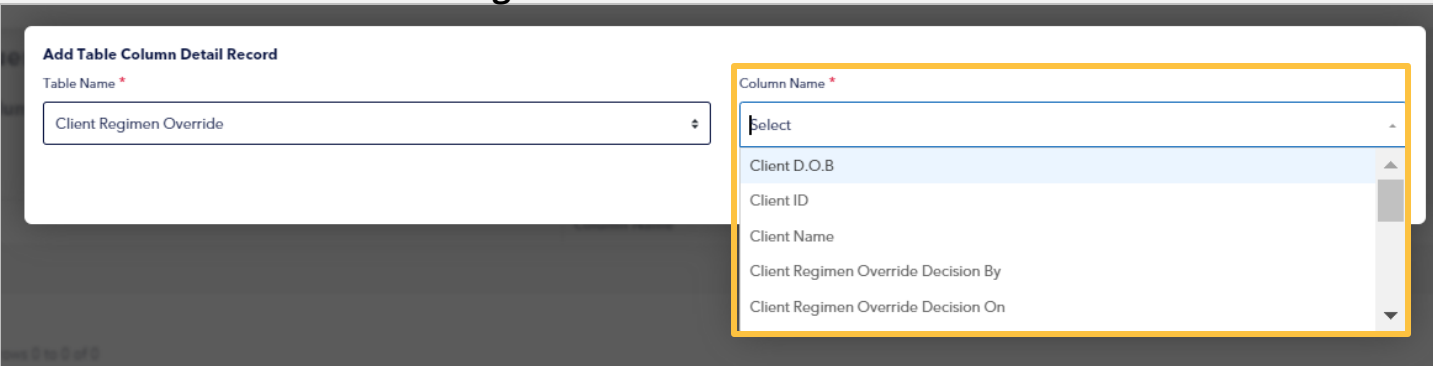
The screenshot displays a web form titled "Add Table Column Detail Record". It contains two dropdown menus. The first dropdown, labeled "Table Name", has "Client Regimen" selected. The second dropdown, labeled "Column Name", is open and shows a list of options: "Select", "Client DOB", "Client ID" (which is highlighted in blue), "Client Name", "Count As", and "Day Supply".

Feature Updates: Sprint 20

Reports Ad Hoc Report Pharmacy Table and Column Name Enhancements Cont.

- When a User selects the '**Client Regimen Override**' Table Name option, the following picklist values will display under the Column Name:
 - Client ID
 - Client Name
 - Client D.O.B
 - Trade Name
 - Generic Name
 - Dosage Strength
 - Measure
 - Form
 - Day Supply
 - Last Order Date
 - Client Regimen Denial Reason
 - Reason for Regimen Override
 - Client Regimen Override Status
 - Pharmacy ID
 - Pharmacy Name
 - Client Regimen Override Submitted By
 - Client Regimen Override Submitted On
 - Client Regimen Override Decision By
 - Client Regimen Override Decision On

Client Regimen Override Column Name Values



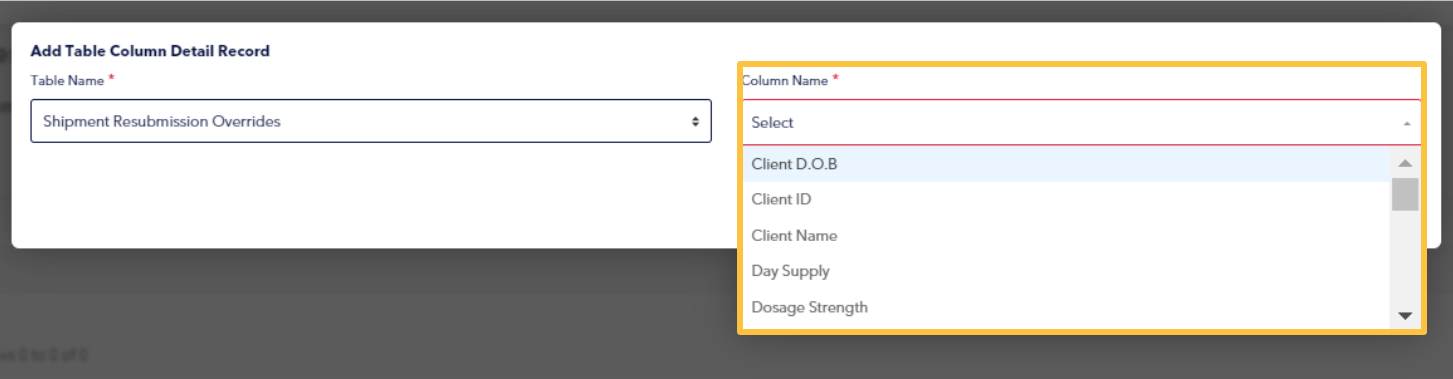
The screenshot displays a web form titled "Add Table Column Detail Record". It contains two main dropdown menus. The "Table Name" dropdown is set to "Client Regimen Override". The "Column Name" dropdown is open, showing a list of available column names. The list includes "Client D.O.B", "Client ID", "Client Name", "Client Regimen Override Decision By", and "Client Regimen Override Decision On". The "Column Name" dropdown is highlighted with a yellow border.

Feature Updates: Sprint 20

Reports Ad Hoc Report Pharmacy Table and Column Name Enhancements Cont.

- When a User selects the '**Shipment Resubmission Overrides**' Table Name option, the following picklist values will display under the Column Name:
 - Client ID
 - Client Name
 - Client D.O.B
 - Trade Name
 - Generic Name
 - Dosage Strength
 - Measure
 - Form
 - Day Supply
 - Quantity
 - Original Order ID
 - Last Order Date
 - Resubmit Reason
 - Resubmission Date
 - Shipment Resubmission Status
 - Pharmacy ID
 - Pharmacy Name
 - Shipment Resubmission Override Submitted By
 - Shipment Resubmission Override Submitted On
 - Shipment Resubmission Override Decision By
 - Shipment Resubmission Override Decision On

Shipment Resubmission Overrides Column Name Values



The screenshot displays a web form titled "Add Table Column Detail Record". It contains two main dropdown menus. The "Table Name" dropdown is set to "Shipment Resubmission Overrides". The "Column Name" dropdown is open, showing a list of available columns. The columns listed are: Client D.O.B, Client ID, Client Name, Day Supply, and Dosage Strength. The "Client D.O.B" option is currently selected and highlighted in blue.

Feature Updates: Sprint 20

Reports Ad Hoc Report Pharmacy Table and Column Name Enhancements Cont.

- The Column Name picklist values will be multi-select for the applicable Client Medication Orders, Client Medication Order Override, Client Regimen, Client Regimen Override, and Shipment Resubmission Overrides Table Name categories.

Column Name Values Multi-Select Capability

The screenshot shows a form titled "Add Table Column Detail Record". It has two main input fields: "Table Name" and "Column Name". The "Table Name" field contains the text "Shipment Resubmission Overrides". The "Column Name" field is highlighted with an orange border and contains a multi-select list with two items: "Day Supply" and "Dosage Strength". Both items have a small 'x' icon next to them, indicating they can be removed. There is also a small 'x' icon at the end of the field with a dropdown arrow. At the bottom right of the form are two buttons: "Add Record" (blue) and "Cancel" (white with blue border).

- This enhancement is applicable to New and Saved Ad Hoc Queries.
- This enhancement is applicable to the Agency Portal only.

Feature Updates: Sprint 20

Reports Ad Hoc Report Client Race and Client Ethnicity Origin Enhancements

When a TCT User navigates to the Ad Hoc Query Builder, the following enhancements will occur:

- After selecting the 'Contracts, Services, Client Medical and Risk' Data Source, the following Table Name categories will be available for selection on the Table and Column Details screen via the 'Add Record' button:
 - Client Race
 - Client Ethnicity Origin
- When a User selects the '**Client Race**' Table Name category, the following Column Name values will display:
 - Race: Client ID
 - Race
 - Race Sub Type
 - RaceCode
 - RaceSubTypeCode
- When a User selects the '**Client Ethnicity Origin**' Table Name category, the following Column Name values will display:
 - Ethnicity: Client ID
 - Ethnicity Origin
 - Ethnicity Origin Code
- The existing Client Address Table Name's Column Name values will be removed from selection:
 - Mailing Zip Code 4
 - Physical Zip Code 4
- The above Client Address Table Name's Column Name Values will be updated to the following:
 - Mailing Zip Code
 - Physical Zip Code
- The Column Name picklist values will be multi-select for the applicable Client Race and Client Ethnicity Origin Table Name categories.
- This enhancement is applicable to New and Saved Ad Hoc Queries.
- This enhancement is applicable to the Agency Portal only.

Feature Updates: Sprint 20

Reports Ad Hoc Report Client Race and Client Ethnicity Origin Enhancements Cont.

Client Race Table Name Selection

Add Table Column Detail Record

Table Name *

Select

Client Hospital Visit Detail

Client Immunization Detail

Client Lab Results

Client Lipid Panel Detail

Client Master

Client Medical

Client Medication Adherence

Client Medication Order Override

Client Medication Orders

Client NonART Medication Detail

Client Pap Smear Test Detail

Client Pelvic Exam Detail

Client Pregnancy Detail

Client Race

Add Record

Cancel

Client Ethnicity Origin Table Name Selection

Add Table Column Detail Record

Table Name *

Select

AgencyContractServices Report

Barriers To Care Assessment

Behavioral Risk Assessment

Client

Client Acuity

Client Address

Client AIDS Diagnosis Details

Client ARP Detail

Client ART Detail

Client CD4Load Details

Client Chronic Condition

Client Contact

Client EmergencyContact

Client Ethnicity Origin

Add Record

Cancel

Feature Updates: Sprint 20

Reports Ad Hoc Report Client Race and Client Ethnicity Origin Enhancements Cont.

Client Race Column Name Values

Add Table Column Detail Record

Table Name *

Client Race

Column Name *

Select

Race

Race Sub Type

Race: Client Id

RaceCode

RaceSubTypeCode

Client Ethnicity Origin Column Name Values

Add Table Column Detail Record

Table Name *

Client Ethnicity Origin

Column Name *

Select

Ethnicity Origin

Ethnicity Origin Code

Ethnicity: Client Id

Feature Updates: Sprint 20

Reports Ad Hoc Report Client Race and Client Ethnicity Origin Enhancements Cont.

Updated Client Address Column Name Values

Add Table Column Detail Record

Table Name *

Client Address

Column Name *

Select

Mailing Geographic Area

Mailing State Description

Mailing Zip Code

Physical Address ValidFrom

Physical AddressLine1

Add Table Column Detail Record

Table Name *

Client Address

Column Name *

Select

Physical City

Physical County

Physical Geographic Area

Physical State Description

Physical Zip Code

Feature Updates: Sprint 20

Reports Ad Hoc Report Modifying Existing Queries

- When a TCT User navigates to the Ad Hoc Query Builder, the following enhancements will occur:
- Users will now have the ability to modify existing queries on the Query History Details screen via the **‘Edit Query Name’** and **‘Edit Query Details’** action buttons.

‘Edit Query Name’ and ‘Edit Query Details’ Action Buttons on Query History Details Screen

AdHoc Query Builder

Query History Details

New Query

Query Name	Query Description	Created by	Created on	Actions		
09132024_Fundingsourcefilter	09132024_Fundingsourcefilter	testthraradmin	09/13/2024	Edit Query Name	Edit Query Details	Share Delete
09162024_run2	09162024_run2	testthraradmin	09/16/2024	Edit Query Name	Edit Query Details	Share Delete
09162024_testone	09162024_testone	testthraradmin	09/16/2024	Edit Query Name	Edit Query Details	Share Delete
CD4 Data 1	CD4 Data for 2021 and 2022 till date	hrradminmanager	07/18/2022	Edit Query Name	Edit Query Details	Share
Client Medication Orders	Client Medication Orders-Test	testthraradmin	08/21/2024	Edit Query Name	Edit Query Details	Share Delete
Client Regimen	Client Regimen_Test	testthraradmin	08/21/2024	Edit Query Name	Edit Query Details	Share Delete
Client Regimen-TestLatest	Client Regimen-testing	testthraradmin	08/30/2024	Edit Query Name	Edit Query Details	Share Delete
Client Regimen-TestLatest	Client Regimen-testing	testthraradmin	08/30/2024	Edit Query Name	Edit Query Details	Share Delete
ClientRegimen	Test-Dev/Test-Check	testthraradmin	09/08/2024	Edit Query Name	Edit Query Details	Share Delete
Query_test_1	Query_test_1	testthraradmin	09/03/2024	Edit Query Name	Edit Query Details	Share Delete
Shipment Resubmission Overrides	Shipment Resubmission Overrides-Pharmacy-730	testthraradmin	08/21/2024	Edit Query Name	Edit Query Details	Share Delete
Shipment Resubmission Overrides	Shipment Resubmission Overrides-Pharmacy-782	testthraradmin	08/21/2024	Edit Query Name	Edit Query Details	Share Delete
Shippiment	test	testthraradmin	08/20/2024	Edit Query Name	Edit Query Details	Share Delete
Test-1	Client Regimen	testthraradmin	08/21/2024	Edit Query Name	Edit Query Details	Share Delete
UAT_Test1_09132024	UAT_Test1_09132024	testthraradmin	09/13/2024	Edit Query Name	Edit Query Details	Share Delete

Feature Updates: Sprint 20

Reports Ad Hoc Report Modifying Existing Queries Cont.

- When a User clicks on the 'Edit Query Details' hyperlink, they will be routed to the Table and Column Details screen to modify the existing query's filters via the 'Delete' and/or 'Add Record' buttons.
 - The modification change(s) will operate the same as if creating a New Ad Hoc Query.
 - Users must first select their Agency before making any modification(s) to a Saved Ad Hoc Query.
 - Users will need to click on the 'Save Query' button to save the filters to the Saved Ad Hoc Query.
 - Users will continue to export the Saved Ad Hoc Query via the 'Export Query' button.

'Delete' and 'Add Record' Buttons for Modifications Made to Saved Ad Hoc Queries

AdHoc Query Builder

Agency Or Administrative Agency *

Select

Table And Column Details

Table Name

AgencyContractServices Report

Column Name

Contract Name

Actions

Delete

Table Name

Agency Funding Source

Column Name

Funding Source Name

Actions

Delete

15 Showing rows 1 to 2 of 2

Filter Details

Table Name

Column Name

Operator

Value

Actions

N/A

15 Showing rows 0 to 0 of 0

Back to Query History

Execute Query

Feature Updates: Sprint 20

Reports Ad Hoc Report Modifying Existing Queries Cont.

Saved Ad Hoc Query Before Filter Modifications

AdHoc Query Builder

Agency Or Administrative Agency *

45000 - Texas Department of State Health Services x

Table And Column Details

Add Record

Table Name	Column Name	Actions
Agency/Contract/Services Report	Contract Name	Delete
Agency Funding Source	Funding Source Name	Delete

Showing rows 1 to 2 of 2

Filter Details

Add Record

Table Name	Column Name	Operator	Value	Actions
N/A				

Showing rows 0 to 0 of 0

Back to Query History

Execute Query

Added Filter to Saved Ad Hoc Query

Add Table Column Detail Record

Table Name *

Client Race x

Column Name *

Race x |

Add Record

Cancel

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Feature Updates: Sprint 20

Reports Ad Hoc Report Modifying Existing Queries Cont.

Saved Ad Hoc Query Filters Updated

AdHoc Query Builder

Agency Or Administrative Agency *

4800 - Texas Department of State Health Services

Table And Column Details

Add Record

Table Name	Column Name	Actions
AgencyContractServices Report	Contract Name	Delete
Agency Funding Source	Funding Source Name	Delete
Client Race	Race	Delete

Feature Updates: Sprint 20

Reports Ad Hoc Report Modifying Existing Queries Cont.

- When a User clicks on the 'Edit Query Name' hyperlink, they will be routed to the Edit Saved Query pop up to modify the existing query's name and description.
 - *User must click on the 'Save' button to capture the updates made to the Saved Query's Name and Description.*
- This enhancement is applicable to Saved Ad Hoc Queries only.
- This enhancement is applicable to the Agency Portal only.

Edit Saved Query Pop Up for Updating Saved Ad Hoc Query Name and Description

Edit saved query

Query Name *

TEST

Query Description *

Release Notes

Save

Cancel