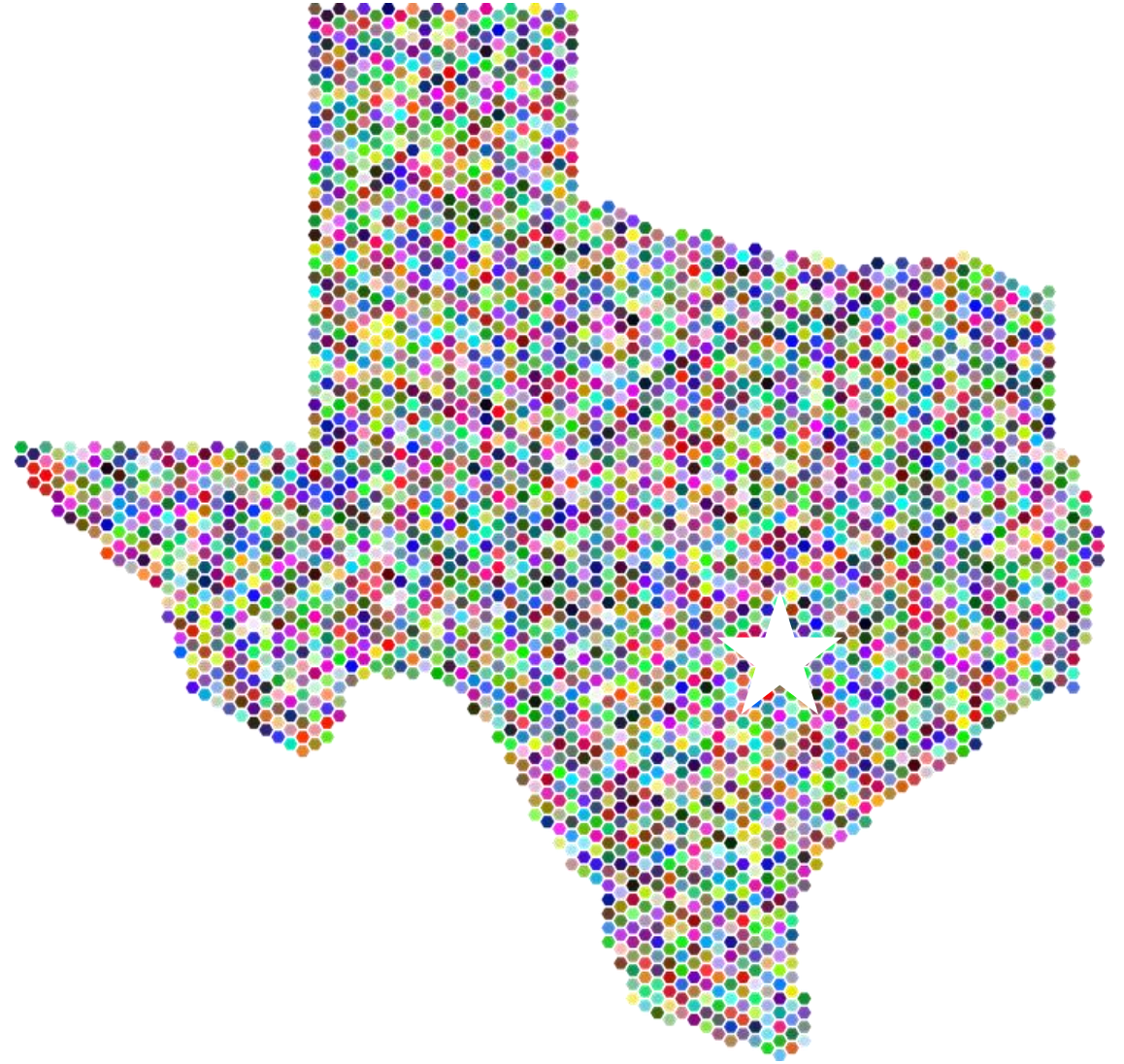


Take Charge Texas (TCT) User Engagement Session

November 14th, 2024



Meet the Facilitators

DSHS/HHSC TEAM



Charletha Joseph
Program Support



Rachel Sanor
HIV Care and
Medications Unit
Director



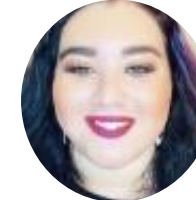
Christine Salinas
ADAP Regional
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Specialist



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DELOITTE TEAM



Nikki Fernandes
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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 Mpo Language in TCT
- Pharmacy Cover Letter Updates
- Task Board – Displaying Reason for Emergency Application
- Performing Bulk Edits on the Task Board: THMP Owner & CARE Owner
- Remove THMP Region from User Scope Assignment

Sprint 8

- Creating History Logs: Relationships
- Creating History Logs: Medical Data
- Creating History Logs: About You Information
- Creating History Logs: Authorized Release
- Updates to Automated & Manual Merge Exception Handling
- Updates THMP Denial, Pend, Reject Reasons when Overriding Eligibility Recommendation
- Ability to Manually End Ongoing Eligibility
- Displaying Override Comments after Eligibility is Complete
- Capturing Hold History for Manual/Automatic Holds
- Update Create Client Import XML to Include AIDN

Project Plan: Successfully Completed Features

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



SPRINT 9

Focused on providing enhancements to the Pharmacy Portal and improving client privacy in the TCT Portal. Additionally, enhancements were provided to the Medical and Client Services import process for agencies.



SPRINT 10

Focused on enhancing the financial information, FPL process and history tracking capabilities for financials and insurance. Additionally, updated the SFTP process for Medical and Services imports to allow for increased data import volume.



SPRINT 11

Focused on enhancing the Financial Information and its history, updating the FPL process to accommodate TCT and non-TCT Portal Clients for RSR Reporting, in addition, curated pharmacy report for overrides. Furthermore, established SFTP process for Medical and Services Import through Global Scape.



SPRINT 12

Focused on enhancing the medication resubmission process as well as updating the verbiage within the HOPWA contracts. Furthermore, provided the capability for Admins to view the FPL and RSR Client by Zip Code Reports, and enhancements to allow System denial on expired Eligibility periods.

User Stories

Sprint 9

- Masking SSN on Client Search and Client Details Screens
- Display Created By on Order Dashboard
- Notification for Order Override Denials for Pharmacist
- Notification for Order Override Approvals for Pharmacist
- Pharmacy Notes on Pharmacy Details Screen
- Merging Eligibility Records by Eligibility Decision Date for Clients with the Same Subprogram
- Addition of TX Department of State Health Services on the HAB Report
- HAB Report – Multiple Agency Selection
- Generating Pharmacy Copy Letters Based on Latest Transaction
- Updated Services Import XML Process to Include AIDN
- Updated Medical Import XML Process to Include AIDN

Sprint 10

- Client Financial Information Enhancements
- Creating History Log: Financial Data
- Relationships Screen Enhancements
- Creating History Log: Insurance History
- Pharmacy Portal: Indication Whether Batches were Received
- Resubmission Process for Resubmission of Orders
- RSR: Calculating Missing FPL Values for CARE Clients via Batch
- FPL Process: Create Client Import Process Enhancement
- STFP Process: Service Records Updates
- STFP Process: Service Records – Successful Client Update Email
- STFP Process: Service Records – Failed Client Update Email
- STFP Process: Medical Records Updates
- STFP Process: Medical Records – Successful Client Update Email
- STFP Process: Medical Records – Failed Client Update Email

Sprint 11

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

Sprint 12

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

Project Plan: Successfully Completed Features

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



SPRINT 13

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



SPRINT 14

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



SPRINT 15

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



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

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 21

Focused on enhancing the Pharmacy Portal by implementing the Manufacturer Search and Manufacturer Details screens, so manufacturer information can independently searched and created. Enhanced the Eligibility Summary and Eligibility History screens when a Client's THMP and/or CARE eligibility is manually ended, so an audit trail of the details can be effectively tracked. Updated the Client Portal Help Center Spanish translations. Introduced the Dropped THMP ADAP Report to conveniently export client record(s) who have been dropped from the THMP program. Created the Client Inactivation Report to track client(s) who have been flagged as inactive (*Other Inactive or Deceased*) in the TCT System.

User Stories

Sprint 21

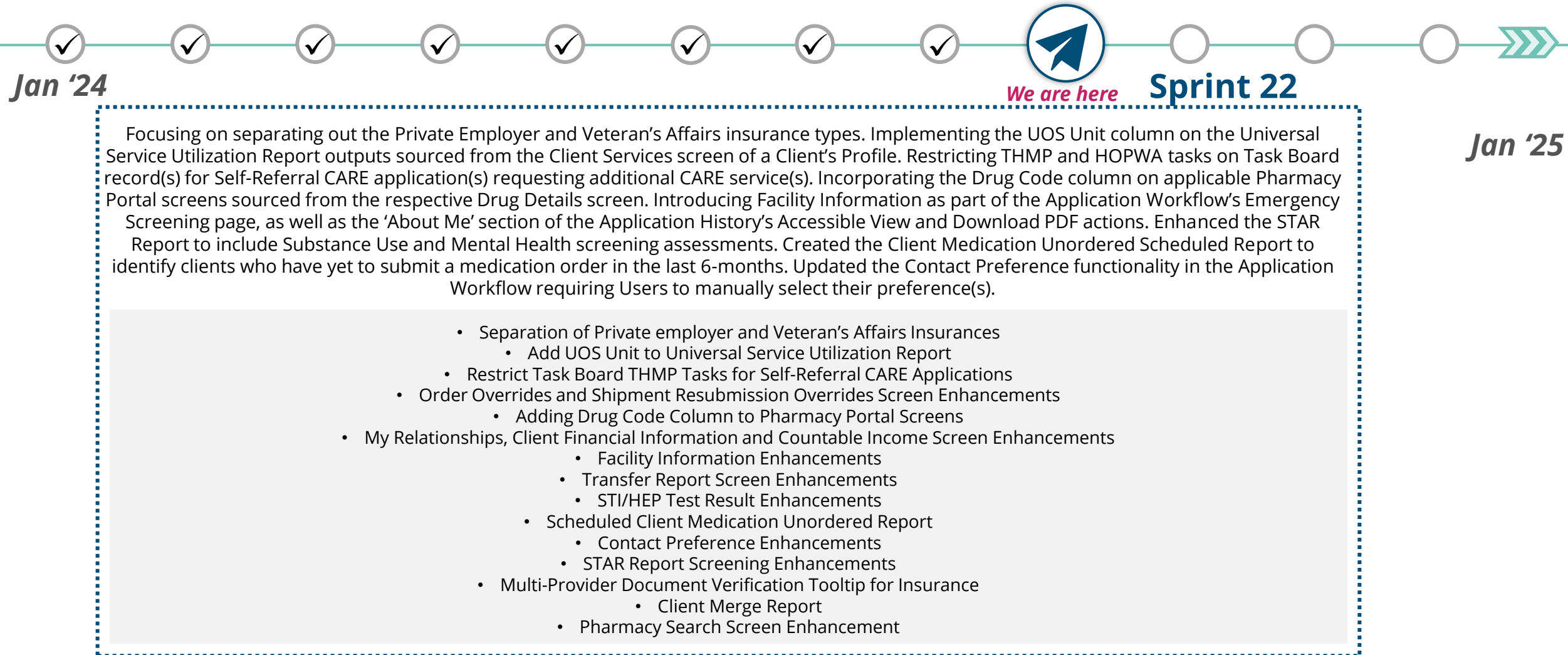
- Add New Manufacturer Screen
- Search Manufacturer Enhancement
- Addition of Task Board Updates to Staff Activity Audit Report
- Task Board History Pop Up Enhancement
- Alphabetization and Export Enhancements of Reports
- Eligibility History Screen Enhancements
- Tabular Format Relationships Screen Enhancement
- Spanish Translation Updates in Client Portal
- Client Merge and Duplicate Client Identification Reports
- HSDA & Hyperlink Enhancements
- Dropped THMP ADAP Clients Report
- Client Inactivation Report
- Addition of Authorized Release Enhancement to Application Workflow
- Package Size Enhancements to Pharmacy Portal Screens
- Preventing Duplicate Values for Primary and Secondary Languages

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 22.



System Overview: **New** TCT Features



Live Demonstration of TCT Features

TCT Features Video Presentation

- [Add New Manufacturer Screen](#)
- [Search Manufacturer Enhancement](#)
- [Addition of Task Board Updates to Staff Activity Audit Report](#)
- [Task Board History Pop Up Enhancement](#)
- [Alphabetization and Export Enhancements of Reports](#)
- [Eligibility History Screen Enhancements](#)
- [Tabular Format Relationships Screen Enhancement](#)
- [Spanish Translation Updates in Client Portal](#)
- [Client Merge and Duplicate Client Identification Reports HSDA & Hyperlink Enhancements](#)
- [Dropped THMP ADAP Clients Report](#)
- [Client Inactivation Report](#)
- [Addition of Authorized Release Enhancement to Application Workflow](#)
- [Package Size Enhancements to Pharmacy Portal Screens](#)
- [Preventing Duplicate Values for Primary and Secondary Languages](#)



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

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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



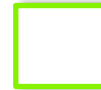
Upcoming Activities

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 21

Pharmacy Add New Manufacturer Screen

When a TCT User navigates to the Manufacturer Search screen, the following enhancements will occur:

- A new '**Add Manufacturer**' button will exist on the Manufacturer Search screen.
- When a User clicks on the 'Add Manufacturer' button, the User will be routed to the **Manufacturer Details** screen.

Manufacturer Search

Please enter the details of the manufacturer you are trying to locate.

Manufacturer Code

Manufacturer Name

Manufacturer Code	Manufacturer Name	Manufacturer Address 1	Manufacturer Address 2	Manufacturer City	Manufacturer State	Manufacturer Zip Code	Manufacturer County	Manufacturer Country
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- The Manufacturer Details screen will have the following search criteria, including:
 - Manufacturer Code
 - This field will display the pre-populated Manufacturer Code generated by the TCT System.
 - The Manufacturer Code will uniquely identify the new manufacturer and will be non-editable/grayed out.
 - Manufacturer Name
 - This will be a mandatory, free text field accepting alpha-numeric and special character values.
 - Title
 - This will be an optional, free text field accepting alpha-numeric values.

Feature Updates: Sprint 21

Pharmacy Add New Manufacturer Screen Cont.

- Below the 'Create Manufacturer' section, the following address section(s) will display:
 - Physical Address
 - The User will be required to input the Physical Address section when creating a new manufacturer as this section is mandatory.
 - Mailing Address
 - The User will not be required to input the Mailing Address section when creating a new manufacturer as this section is optional.
- The Physical Address section will include the following search criteria:
 - Address Line 1
 - This will be a mandatory, free text field accepting alpha-numeric values.
 - Address Line 2
 - This will be an optional, free text field accepting alpha-numeric values.
 - City
 - This will be a mandatory, free text field accepting alpha-numeric values.
 - State
 - This will be a conditional search field.
 - If the User selects the 'United States' value for the Country search field, then the 'State' field will become a mandatory, single-select drop down displaying all state options available for selection.
 - If the User selects the 'Other' value for the Country search field, then the 'Other Country' mandatory, free text field will display, making the 'State' field an optional, free text field.
 - Zip Code
 - This will be a mandatory, free text field accepting alpha-numeric values.
 - County
 - This will be an optional, non-conditional, free text field accepting alpha-numeric values.
 - Country
 - This field will have 'United States' option as the pre-selected value.
 - This will be a mandatory, single-select drop down containing the 'United States' and 'Other' picklist values.
 - If the 'United States' value is selected, then the 'State' mandatory, single-select drop down will display all applicable state options.
 - If the 'Other' value is selected, then the 'Other Country' mandatory, conditional free text field will display along with the optional, free text 'State' field.
 - Other Country
 - This mandatory, conditional free text field will only populate when the User indicates the 'Other' value for the Country search field

Feature Updates: Sprint 21

Pharmacy Add New Manufacturer Screen Cont.

- The Mailing Address section will include the following search criteria:
 - Address Line 1
 - This will be an optional, free text field accepting alpha-numeric values.
 - Address Line 2
 - This will be an optional, free text field accepting alpha-numeric values.
 - City
 - This will be an optional, free text field accepting alpha-numeric values.
 - State
 - This will be a conditional search field.
 - If the User selects the 'United States' value for the Country search field, then the 'State' field will become an optional, single-select drop down displaying all state options available for selection.
 - If the User selects the 'Other' value for the Country search field, then the 'Other Country' optional, free text field will display, making the 'State' field an optional, free text field.
 - Zip Code
 - This will be an optional, free text field accepting alpha-numeric values.
 - County
 - This will be an optional, non-conditional, free text field accepting alpha-numeric values.
 - Country
 - This field will have the 'United States' option as the pre-selected value.
 - This will be an optional, single-select drop down containing the 'United States' and 'Other' picklist values.
 - If the 'United States' value is selected, then the 'State' optional, single-select drop down will display all applicable state options.
 - If the 'Other' value is selected, then the 'Other Country' optional, conditional free text field will display along with the optional, free text 'State' field.
 - Other Country
 - This optional, conditional free text field will only populate when the User indicates the 'Other' value for the Country search field

Feature Updates: Sprint 21

Pharmacy Add New Manufacturer Screen Cont.

- The Manufacturer Details screen will include the following button:
 - Create Manufacturer
- If a User clicks on the 'Create Manufacturer' button without inputting the required manufacturer fields, the following validation message will display on screen:
 - "This is a required field."
- When a User successfully creates a new manufacturer by clicking on the 'Create Manufacturer' button, after inputting the required manufacturer fields, the following validation message will appear on the top banner of the screen:
 - "Success – New Manufacturer Created!"
- If the System identifies that a User is attempting to re-create a manufacturer that already exists, the following validation message will appear on the top banner of the screen - *this is to avoid duplicate manufacturers in TCT*:
 - "This manufacturer currently exists in the System. Please refine the manufacturer name."
- Only one manufacturer can be created at a time on the Manufacturer Details screen.
- The manufacturer's details, saved on the Manufacturer Details screen, will render in the Manufacturer Search results table, when a User searches for a particular manufacturer.
- Only HRAR Admins will have the ability to create new manufacturers via the 'Add Manufacturer' button on the Manufacturer Search screen.
 - *The 'Add Manufacturer' button will not be visible nor clickable to all other User Roles.*
- This enhancement is applicable to the Agency Portal only.

Feature Updates: Sprint 21

Pharmacy Add New Manufacturer Screen Cont.

Manufacturer Details Screen

Manufacturer Details

Create Manufacturer

Manufacturer Code

Manufacturer Name *

Title

Physical Address

Address Line 1 *

Address Line 2

City *

State *

County

Zip Code *

Country *

Mailing Address

Address Line 1

Address Line 2

City

State

County

Zip Code

Country

Create Manufacturer

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Feature Updates: Sprint 21

Pharmacy Search Manufacturer Enhancement

When a TCT User navigates to the Pharmacy Portal via the 'Pharmacy' tile on the dashboard, the following enhancements will occur:

- A new 'Search Manufacturer' drop down will display on the left navigation pane.
 - *This new header will appear below the existing 'Search Medication' drop down.*
- The 'Search Manufacturer' drop down will include the 'Search Manufacturer' hyperlink.
 - This new hyperlink will route the User to the **Manufacturer Search** screen.
- The Manufacturer Search screen will have the following search criteria, including:
 - Manufacturer Code
 - This will be an optional, free text field accepting numeric values only.
 - Manufacturer Name
 - This will be an optional, free text field accepting alpha-numeric and special character values.
 - The Manufacturer Name field will accommodate wild card searches (i.e., xyz*).
 - *The wild card search capability will be non-case sensitive.*
- Upon the User entering a valid Manufacturer Code and/or Manufacturer Name search criteria and clicking on the 'Search' button, the following columns and System generated values will render in the results table:
 - Manufacturer Code
 - This column will display the Manufacturer Code value, sourced from the 'Manufacturer Code' field, saved on the respective manufacturer's Manufacturer Details screen.
 - The rendered Manufacturer Code value will be hyperlinked to route the User to the respective manufacturer's Manufacturer Details screen.
 - Manufacturer Name
 - This column will display the Manufacturer Name value, sourced from the 'Manufacturer Name' field, saved on the respective manufacturer's Manufacturer Details screen.
 - Address Line 1
 - This column will display the Address Line 1 value, sourced from the Physical Address 'Address Line 1' field, saved on the respective manufacturer's Manufacturer Details screen.
 - Address Line 2
 - This column will display the Address Line 2 value, sourced from the Physical Address 'Address Line 2' field, saved on the respective manufacturer's Manufacturer Details screen.

Search Manufacturer Drop Down

[Back to dashboard](#)

Manage Overrides ▾

Search Medication ▾

Search Manufacturer ▲

[Search Manufacturer](#)

Search Pharmacy ▾

Search Doctor ▾

Feature Updates: Sprint 21

Pharmacy Search Manufacturer Enhancement Cont.

- City
 - This column will display the City value, sourced from the Physical Address 'City' field, saved on the respective manufacturer's Manufacturer Details screen.
- State
 - This column will display the State value, sourced from the Physical Address 'State' field, saved on the respective manufacturer's Manufacturer Details screen.
- Zip Code
 - This column will display the Zip Code value, sourced from the Physical Address 'Zip Code' field, saved on the respective manufacturer's Manufacturer Details screen.
- County
 - This column will display the County value, sourced from the Physical Address 'County' field, saved on the respective manufacturer's Manufacturer Details screen.
- Country
 - This column will display the Country value, sourced from the Physical Address 'Country' field, saved on the respective manufacturer's Manufacturer Details screen.
 - For any pre-existing manufacturers who did not indicate a Country value, the 'Manufacturer Country' column will display a double dash (--).
 - *Users can update the Country value on the respective manufacturer's Manufacturer Details screen.*
- The Manufacturer Search screen will have the following action buttons:
 - Search
 - When a User clicks on the 'Search' button, after inputting search criteria on the Manufacturer Search screen, the manufacturer's data will then render in the results table.
 - Add Manufacturer
 - When a User clicks on the 'Add Manufacturer' button, on the Manufacturer Search screen, they will be routed to the Manufacturer Details screen to create a new manufacturer.

Feature Updates: Sprint 21

Pharmacy Search Manufacturer Enhancement Cont.

Manufacturer Search Screen

Manufacturer Search

Please enter the details of the manufacturer you are trying to locate.

Manufacturer Code

45454

Manufacturer Name

Search

Add Manufacturer

CSV

X

W

Manufacturer Code	Manufacturer Name	Manufacturer Address 1	Manufacturer Address 2	Manufacturer City	Manufacturer State	Manufacturer Zip Code	Manufacturer County	Manufacturer Country
45454	THERATECH INC	417 WAKARA WAY		SALT LAKE CITY	UT	84108	255	--

Feature Updates: Sprint 21

Pharmacy Search Manufacturer Enhancement Cont.

- The same User Roles who have Read/Write permissions to Search Medications will have the same permissions to Search Manufacturers, including:
 - AA Data Managers
 - ADAP DataManAdmin
 - ADAP_EW_PSI_PHPHII
 - ADAP_EW_PSHI
 - ADAP_ORDER_PROCESSOR
 - ADAP_PSHV_PSV
 - Agency Client Services Staff
- The Manufacturer Search screen's results table will have the following export capabilities:
 - CSV
 - Excel
 - Word
 - PDF
- This enhancement is applicable to the Agency Portal only.

Feature Updates: Sprint 21

Task Board Addition of Task Board Updates to Staff Activity Audit Report

When a TCT User navigates to the Staff Activity Audit Report, found under the 'Accessible Reports' drop down, the following enhancements will occur:

- The Actions column, found in the Staff Audit Hyperlinks results table, will display the 'Update' value for the record(s) rendered, identifying the Document Upload, Application Submission, Eligibility, and/or Task Board update(s).
- A new Screen Visited action, titled '**Updated Task Board**', will display in the Staff Audit Hyperlinks results table for the applicable Task Board record update(s).
- This 'Updated Task Board' action will be hyperlinked to navigate the User to the specific Task Board record(s) in which update(s) were made.
 - *The Task Board record's update(s) can be found by clicking on the 'History' hyperlink under the respective Actions column.*
- The following columns and System generated values will display on the Staff Audit Hyperlinks and Staff Audit Compilation results tables, including:
 - Client ID
 - This column will appear after the existing 'Screen Visited' column.
 - This column will display the applicable Client ID(s) for the respective Document Upload, Application Submission, Eligibility, and/or Task Board action(s).
 - Task ID
 - This column will appear after the new 'Client ID' column.
 - This column will display the Task ID value(s) for the applicable Task Board update(s).
 - The Task ID value(s) will be pre-populated by the System to uniquely identify the Task Board record's action(s).
 - *This is to distinguish Task Board update(s) from Document Upload, Application Submission, and Eligibility action(s).*

Feature Updates: Sprint 21

Task Board Addition of Task Board Updates to Staff Activity Audit Report Cont.

Back to dashboard

Reports

Accessible Reports

Accessible Transfer Report

Active User And Role Report

Clients Coming Up For Renewal Report

Monthly Pharmacy Clients Report

Staff Activity Audit Report

Staff Audit Report

Staff Activity Audit Report Screen/Results Table

Search Criteria

Staff Username *

admin admin (testthraradmin)

Start Date *

08/01/2024

End Date *

10/05/2024

Search

Clear Search

Generated Date : 10/5/2024

Staff Username : testthraradmin

Start Date : 08/01/2024

Staff User ID : testthraradmin

End Date : 10/05/2024

Staff Audit Hyperlinks

Visited On	Action	Screen Visited	Client Id	Task Id	IP Address
10/04/2024 7:39:49 PM	Update	Updated Eligibility	132205		168.40.172.228
10/04/2024 7:40:18 PM	Update	Updated Eligibility	132205		168.40.172.228
10/04/2024 7:40:20 PM	Update	Updated Eligibility	132205		168.40.172.228
10/05/2024 12:27:40 PM	Update	Updated Application Submission	438031		168.40.172.228
10/05/2024 2:44:14 PM	Update	Updated Task Board	403561	2014572	168.40.172.228

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Showing rows 646 to 650 of 650

<< < 40 41 42 43 44

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Feature Updates: Sprint 21

Task Board Task Board History Pop Up Enhancement

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

- A new hyperlinked action button, titled '**History**', will display under the Actions column for all Task Board record(s) rendered in the results table.
- When a User clicks on a Task Board record's History button, the following columns and System generated values will display on the Task Board History pop up(s), including:
 - Updated Date
 - This column will display the Date and Timestamp of the User who last updated the Task Board record(s).
 - Format: MM/DD/YYYY, HH:MM AM / PM
 - Client ID
 - This column will display the Client ID for which the Task Board record(s) is associated to.
 - Application ID
 - This column will display the unique Application ID for which the Task Board record(s) is associated to.
 - Programs
 - This column will display the Program(s) the Client applied for in their application.
 - THMP Region
 - This column will display the THMP Region as indicated in the Task Board's Edit Task pop up.
 - Values: Dallas/Ft. Worth Area, Houston/East Texas Area, San Antonio/Austin Area
 - THMP Subprograms
 - This column will display the THMP Subprogram(s) the Client applied for in their application, or the Subprogram(s) the User updated for the applicable Task Board record(s).
 - Values: ADAP, SPAP, and/or TIAP
 - If the Task Board record's action is not associated to THMP, then the 'THMP Subprogram' column will display a double dash (--).
 - THMP Subprogram Last Updated By
 - This column will display the Last Name, First Name of the User who updated the THMP Subprogram(s).
 - If the Task Board record's action is not associated to THMP, then the 'THMP Subprogram Last Updated By' column will display a double dash (--).
 - THMP Subprogram Last Updated On
 - This column will display the Date and Timestamp of the User who updated the THMP Subprogram(s)
 - If the Task Board record's action is not associated to THMP, then the 'THMP Subprogram Last Updated On' column will display a double dash (--).

Feature Updates: Sprint 21

Task Board Task Board History Pop Up Enhancement Cont.

- When a User clicks on a Task Board record's History button, the following columns and System generated values will display on the Task Board History pop up:
 - THMP Owner
 - This column will display the THMP Owner assignment as indicated in the Task Board's Edit Task pop up.
 - Values: Unassigned, Assigned (*Last Name, First Name*)
 - If the Task Board record's action is not associated to THMP, then the 'THMP Owner' column will display a double dash (--).
 - THMP Owner Last Updated By
 - This column will display the Last Name, First Name of the User who updated the THMP Owner assignment.
 - If the Task Board record's action is not associated to THMP, then the 'THMP Owner Last Updated By' column will display a double dash (--).
 - THMP Owner Last updated On
 - This column will display the Date and Timestamp of the User who updated the THMP Owner assignment.
 - If the Task Board record's action is not associated to THMP, then the 'THMP Owner Last Updated On' column will display a double dash (--).
 - CARE Owner
 - This column will display the CARE Owner assignment as indicated in the Task Board's Edit Task pop up.
 - Values: Unassigned, Assigned (*Last Name, First Name*)
 - If the Task Board record's action is not associated to CARE, then the 'CARE Owner' column will display a double dash (--).
 - CARE Owner Last Updated By
 - This column will display the Last Name, First Name of the User who updated the CARE Owner assignment.
 - If the Task Board record's action is not associated to CARE, then the 'CARE Owner Last Updated By' column will display a double dash (--).
 - CARE Owner Last updated On
 - This column will display the Date and Timestamp of the User who updated the CARE Owner assignment.
 - If the Task Board record's action is not associated to CARE, then the 'CARE Owner Last Updated On' column will display a double dash (--).
 - THMP Status
 - This column will display the THMP Status as indicated in the Task Board's Edit Task pop up.
 - Values: Complete, Not Applicable, Assigned, Pending More Information, Received
 - If the Task Board record's action is not associated to THMP, then the 'THMP Status' column will display a double dash (--).
 - THMP Status Last Updated By
 - This column will display the Last Name, First Name of the User who updated the THMP Status.
 - If the Task Board record's action is not associated to THMP, then the 'THMP Status Last Updated By' column will display a double dash (--).

Feature Updates: Sprint 21

Task Board Task Board History Pop Up Enhancement Cont.

- When a User clicks on a Task Board record's History button, the following columns and System generated values will display on the Task Board History pop up:
 - THMP Status Last Updated On
 - This column will display the Date and Timestamp of the User who updated the THMP Status.
 - If the Task Board record's action is not associated to THMP, then the 'THMP Status Last Updated On' column will display a double dash (--).
 - CARE Status
 - This column will display the CARE Status as indicated in the Task Board's Edit Task pop up.
 - Values: Complete, Not Applicable, Assigned, Pending More Information, Received
 - If the Task Board record's action is not associated to CARE, then the 'CARE Status' column will display a double dash (--).
 - CARE Status Last Updated By
 - This column will display the Last Name, First Name of the User who updated the CARE Status.
 - If the Task Board record's action is not associated to CARE, then the 'CARE Status Last Updated By' column will display a double dash (--).
 - CARE Status Last Updated On
 - This column will display the Date and Timestamp of the User who updated the CARE Status.
 - If the Task Board record's action is not associated to CARE, then the 'CARE Status Last Updated On' column will display a double dash (--).
 - HOPWA Status
 - This column will display the HOPWA Status as indicated in the Task Board's Edit Task pop up.
 - Values: Complete, Not Applicable, Assigned, Pending More Information, Received
 - If the Task Board record's action is not associated to HOPWA, then the 'HOPWA Status' column will display a double dash (--).
 - HOPWA Sponsor
 - This column will display the HOPWA Sponsor as indicated in the Task Board's Edit Task pop up.
 - If the Task Board record's action is not associated to HOPWA, then the 'HOPWA Status' column will display a double dash (--).
 - CARE Agency
 - This column will display the CARE Agency as indicated in the Task Board's Edit Task pop up.
 - If the Task Board record's action is not associated to CARE, then the 'CARE Agency' column will display a double dash (--).

Feature Updates: Sprint 21

Task Board Task Board History Pop Up Enhancement Cont.

- Each Task Board record's action(s) will be its own unique row in the Task Board History pop up.
 - *The history log(s) will be tracked in descending order with the last transaction update appearing on top.*
- The Task Board History pop up(s) will have the following export capabilities:
 - CSV
 - Excel
 - Word
 - PDF
- This enhancement is applicable to the Agency Portal only.

'History' Hyperlink Button on Task Board Screen

Task Board

CARE Status

Select an Option

THMP Status

Select an Option

HOPWA Status

Select an Option

Application Type

Select an Option

THMP Region

Select an Option

THMP Owner

Select an Option

THMP Subprograms

Select an Option

Emergency App Reason

Select an Option

CARE Agency

Select

CARE Owner

Select an Option

Birth Month

Select an Option

Client ID

Submitted Start Date

MM/DD/YYYY

Submitted End Date

MM/DD/YYYY

Bulk Assign

Clear Search

Search

Export Icons

Select	Client ID	Client Name	Birth Date	Task Type	Client Updates	Programs	THMP Subprogram	Emergency App	Emergency App Reason	Date Submitted	CARE Status	THMP Status	HOPWA Status	Agency	CARE Owner	THMP Region	THMP Owner	Actions
☐	403561	Aileya Bennet	09/12/1999	Application		CARE THMP	ADAP	No		03/25/2022	Assigned	Complete	Not applicable	4816 - Harris County Hospital District Foundation - DBA Harris Health System	Michael Murphy	Houston/East Texas Area	Unassigned	View History

Feature Updates: Sprint 21

Task Board Task Board History Pop Up Enhancement Cont.

Task Board History Pop Up on Task Board Screen

Task Board History

CSVXWPDF

Updated On	Client ID	Application ID	Programs	THMP Region	THMP Subprogram	THMP Subprogram Last Updated By	THMP Subprogram Last Updated On	THMP Owner	THMP Owner Last Updated By	THMP Owner Last Updated On	CARE Owner	CARE Owner Last Updated By	CARE Owner Last Updated On	THMP Status	THMP Status Last Updated By	THMP Status Last Updated On	CARE Status	CARE Status Last Updated By	CARE Status Last Updated On	HOPW Status
03/21/2024 6:20 PM	403557	2059717	CARE,THMP	Dallas/Ft. Worth Area	--	--	--	--	--	--	--	--	--	Complete	--	--	Submitted	--	--	Not applicable
06/23/2022 10:22 PM	403557	2059717	CARE,THMP	Dallas/Ft. Worth Area	--	--	--	--	--	--	--	--	--	Received	--	--	Submitted	--	--	Not applicable
03/25/2022 2:30 PM	403557	2059717	CARE,THMP	Dallas/Ft. Worth Area	--	--	--	--	--	--	--	--	--	Submitted	--	--	Submitted	--	--	Not applicable

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Showing rows 1 to 3 of 3

1

Close

Feature Updates: Sprint 21

Reports Alphabetization and Export Enhancements of Reports

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

- The associated reports falling under the 'Reports' and 'Accessible Reports' drop downs will display in alphabetical order.
 - The 'Reports' will display in the following alphabetical order (*reading top to bottom*):
 - CARE Plan Task Report
 - Client Eligibility Status Search Report
 - Client Inactivation Report
 - Client Merge Report
 - Client Regimen Overrides Report
 - Clients On Hold Report
 - Clients With Medicare Insurance Report
 - Data Quality Report
 - Disease Management Report
 - HAB Report
 - Immunization Report
 - Medicaid Match Report
 - Medication Resubmitted Overrides Report
 - MMA Report
 - Mode Of Transmission Report
 - Order Overrides By Pharmacy Report
 - Pending Eligibility Report
 - Primary Service By Provider Report
 - Reports
 - RSR CARE System Derived FPL Report
 - RSR Client By Zip Code Report
 - RSR Report
 - Ryan White/AIDS Services (RSR) Data Completeness Report
 - Special Designation Report
 - STAR Report
 - Universal Service Utilization Report
 - Unsubmitted Client Application Report
 - View HAB Reports
 - View STAR Reports
 - WICY Report
 - Worker Performance Report: All Applications

'Reports' Alphabetization Drop Down



Feature Updates: Sprint 21

Reports Alphabetization and Export Enhancements of Reports Cont.

- The 'Accessible Reports' will display in the following alphabetical order (reading top to bottom):
 - Accessible Transfer Report
 - Active User and Role Report
 - Clients Coming Up for Renewal Report
 - Monthly Pharmacy Clients Report
 - Staff Activity Audit Report
 - Staff Audit Report
- A new export capability will be enabled for all reports in the TCT System, including:
 - CSV
 - *This will be first icon that appears on the report export formats.*

CSV Format for All TCT Reports



'Accessible Reports' Alphabetization Drop Down



Feature Updates: Sprint 21

Eligibility Eligibility History Screen Enhancements

- When a TCT User navigates to the Eligibility Summary screen, the following enhancements will occur:
- The **'End THMP Eligibility'** button will only be enabled to Users who have permissions to manually end a Client's eligibility via the Role to Screen Mapping feature.
 - This is dependent upon the Client having an active/current THMP eligibility record in 'Approved' status.
 - *Permitted Users can still manually end a Client's eligibility even if the Eligibility End Date has been reached, so long as the record is in Approved status.*
 - The **'End CARE Eligibility'** button will only be enabled to Users who have permissions to manually end a Client's eligibility via the Role to Screen Mapping feature.
 - This is dependent upon the Client having an active/current CARE eligibility record in 'Approved' status.
 - *Permitted Users can still manually end a Client's eligibility even if the Eligibility End Date has been reached, so long as the record is in Approved status.*

'End THMP Eligibility' and 'End CARE Eligibility' Buttons on Eligibility Summary Screen

Eligibility Summary

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

You have been evaluated for the following programs.

Current Eligibility Period:

Program	Sub-Program	Eligibility Decision Date	Eligibility Start Date	Eligibility End Date	Eligibility Status	Override	Immediate Denial	Override Comments	Eligibility Decision
CARE	RW Care	10/05/2024	10/05/2024	04/30/2025	Approved	Yes	No	TEST	
THMP	ADAP	10/05/2024	10/05/2024	04/30/2025	Approved	Yes	No		

End THMP Eligibility

End CARE Eligibility

Feature Updates: Sprint 21

Eligibility Eligibility History Screen Enhancements Cont.

- Once a User has manually ended the Client's eligibility (*THMP and/or CARE*), the following logic will occur:
 - On the Eligibility Summary screen, the 'Eligibility Decision Date' and 'Eligibility End Date' value(s) will be updated with the current date (*the date the eligibility was manually ended*).

'Eligibility Decision Date(s)' Updated on Eligibility Summary Screen

Eligibility Summary									
This page is a read-only summary of the client's eligibility.									
You have been evaluated for the following programs.									
Current Eligibility Period:									
CSV X Word PDF									
Program	Sub-Program	Eligibility Decision Date	Eligibility Start Date	Eligibility End Date	Eligibility Status	Override	Immediate Denial	Override Comments	Eligibility Decision
CARE	RW Care	10/05/2024	10/05/2024	10/05/2024	Denied	Yes	Yes	TEST-TEST	Currently Incarcerated
THMP	ADAP	10/05/2024	10/05/2024	10/05/2024	Denied	Yes	Yes		Incarcerated

'Eligibility End Date(s)' Updated on Eligibility Summary Screen

Eligibility Summary									
This page is a read-only summary of the client's eligibility.									
You have been evaluated for the following programs.									
Current Eligibility Period:									
CSV X Word PDF									
Program	Sub-Program	Eligibility Decision Date	Eligibility Start Date	Eligibility End Date	Eligibility Status	Override	Immediate Denial	Override Comments	Eligibility Decision
CARE	RW Care	10/05/2024	10/05/2024	10/05/2024	Denied	Yes	Yes	TEST-TEST	Currently Incarcerated
THMP	ADAP	10/05/2024	10/05/2024	10/05/2024	Denied	Yes	Yes		Incarcerated

Feature Updates: Sprint 21

Eligibility Eligibility History Screen Enhancements Cont.

- Once a User has manually ended the Client's eligibility (*THMP and/or CARE*), the following logic will occur:
 - On the Eligibility Summary screen, the 'Eligibility Status' value(s) will be updated with the 'Denied' value.
 - On the Eligibility Summary screen, the 'Eligibility Decision' value(s) will be updated to display the selected value(s) indicated on the End THMP Eligibility and/or End CARE Eligibility pop up(s).

'Eligibility Status(es)' Updated on Eligibility Summary Screen

Eligibility Summary									
This page is a read-only summary of the client's eligibility.									
You have been evaluated for the following programs.									
Current Eligibility Period:									
CSVXPDF									
Program	Sub-Program	Eligibility Decision Date	Eligibility Start Date	Eligibility End Date	Eligibility Status	Override	Immediate Denial	Override Comments	Eligibility Decision
CARE	RW Care	10/05/2024	10/05/2024	10/05/2024	Denied	Yes	Yes	TEST-TEST	Currently Incarcerated
THMP	ADAP	10/05/2024	10/05/2024	10/05/2024	Denied	Yes	Yes		Incarcerated

'Eligibility Decision(s)' Updated on Eligibility Summary Screen

Eligibility Summary									
This page is a read-only summary of the client's eligibility.									
You have been evaluated for the following programs.									
Current Eligibility Period:									
CSVXPDF									
Program	Sub-Program	Eligibility Decision Date	Eligibility Start Date	Eligibility End Date	Eligibility Status	Override	Immediate Denial	Override Comments	Eligibility Decision
CARE	RW Care	10/05/2024	10/05/2024	10/05/2024	Denied	Yes	Yes	TEST-TEST	Currently Incarcerated
THMP	ADAP	10/05/2024	10/05/2024	10/05/2024	Denied	Yes	Yes		Incarcerated

Feature Updates: Sprint 21

Eligibility Eligibility History Screen Enhancements Cont.

‘End THMP Eligibility’ Pop Up

End THMP Eligibility

Please provide the Denial Reason and additional comments for why you are manually ending the client’s current eligibility period

Program : THMP

SubProgram : ADAP

Denial Reason *

Incarcerated x

x v

Comments

Submit

Cancel

‘End CARE Eligibility’ Pop Up

End CARE Eligibility

Please provide the Denial Reason and additional comments for why you are manually ending the client’s current eligibility period

Program : CARE

SubProgram : RWCARE

Denial Reason *

Currently Incarcerated x

x v

Comments *

TEST

Submit

Cancel

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Feature Updates: Sprint 21

Eligibility Eligibility History Screen Enhancements Cont.

- If future Eligibility record(s) existed for the Client in the 'Next Eligibility Period' results table, found on the Eligibility Summary screen, the record(s) will be removed as the Client's current eligibility was manually ended.
- If any Hold record(s) existed for the Client on the ADAP Holds screen, the record(s) will be removed when a User manually ends a Client's current eligibility.
- For any approved CARE Services, captured in the CARE Services Assignment screen(s), the services will be removed when a User manually ends a Client's current eligibility.
- After manually ending a Client's eligibility (*THMP and/or CARE*), the following logic will occur on the Eligibility History screen:
 - A new THMP and/or CARE record(s) will generate on the 'Current Eligibility History' results table, indicating the following columns and System generated values:
 - Program
 - This column will display the Program the Client was approved for.
 - Values: THMP, CARE
 - Sub Program
 - This column will display the Sub Program the Client was approved for.
 - Values, ADAP, SPAP, TIAP, MAI, RW CARE
 - Start Date
 - This column will display the Start Date of the Client's current eligibility which was manually ended.
 - Format: MM/DD/YYYY
 - End Date
 - This column will display the End Date in which the User manually ended the Client's current eligibility.
 - Format: MM/DD/YYYY
 - Decision Date
 - This column will display the Date and Timestamp the User manually ended the Client's current eligibility.
 - Format: MM/DD/YYYY HH:MM AM / PM
 - Decision, Reason
 - This column will display the Decision Reason the User selected when manually ending the Client's current eligibility.
 - i.e., Deny, Currently Incarcerated
 - i.e., Deny, Incarcerated
 - Override Comments
 - This column will display the 'Manually Ended' value along with any comments indicated by the User when manually ending the Client's current eligibility.
 - i.e., Manually Ended
 - Processed By
 - This column will display the User Name of the User who manually ended the Client's current eligibility.
 - Format: User Name

Feature Updates: Sprint 21

Eligibility Eligibility History Screen Enhancements Cont.

New Record Appears on Eligibility History Screen Upon User Ending Client's Current THMP and/or CARE Eligibility

Eligibility History

Current Eligibility History

CSV

X

W

Program	Sub Program	Application ID	Application Type	Start Date	End Date	Decision Date	Decision, Reason	Override	Immediate Denial	Override Comments	Processed By
THMP	ADAP	2213040	Application	10/05/2024	04/30/2025	10/5/2024, 3:37 PM	Approve	Yes	--		admin admin
THMP	ADAP	2213040	Application	10/05/2024	10/05/2024	10/5/2024, 3:53 PM	Deny, Incarcerated	Yes	Yes	Manually Ended	admin admin
CARE	RW Care	2213040	Application	10/05/2024	04/30/2025	10/5/2024, 3:42 PM	Approve	Yes	--	TEST	admin admin
CARE	RW Care	2213040	Application	10/05/2024	10/05/2024	10/5/2024, 3:53 PM	Deny, Currently Incarcerated	Yes	Yes	TEST-Manually Ended, TEST	admin admin

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Showing rows 1 to 4 of 4

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Feature Updates: Sprint 21

Eligibility Eligibility History Screen Enhancements Cont.

- After manually ending a Client's eligibility (*THMP and/or CARE*), the following logic will occur on the Client's Dashboard:
 - The THMP and/or CARE Programs/Services will display the 'Denied' value as the User manually ended the Client's current eligibility.
- This enhancement is applicable to the Agency Portal only.

Client's Dashboard Updates After User Manually Ends Client's THMP and/or CARE Eligibility

Client Application Dashboard

Status of Services

Substance Use

Program: CARE-RW Care

Denied

Mental Health

Program: CARE-RW Care

Denied

Dental Care

Program: CARE-RW Care

Denied

THMP-Medications (ADAP)

Program: THMP-ADAP

Denied

Feature Updates: Sprint 21

Agency Portal Client Pages Tabular Format Relationships Screen Enhancement

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

- The Relationship record(s), saved via the 'Add a Household Member' button, will now display in a tabular format on both the My Relationships/Client Relationships screens.
- The new tabular format (*results tables*) will have the following columns and System generated values:
 - Relationship
 - This column will display the Relationship value, sourced from the mandatory, single-select 'Relationship' drop down, on the Add Relationship Record pop up.
 - The corresponding Spanish translation will exist in the Client Portal:
 - Relación
 - First Name
 - This column will display the First Name value, sourced from the mandatory, free text 'First Name' field, on the Add Relationship Record pop up.
 - The corresponding Spanish translation will exist in the Client Portal:
 - Nombre
 - Middle Initial
 - This column will display the Middle Initial value, sourced from the optional, free text 'Middle Initial' field, on the Add Relationship Record pop up.
 - If a User does not enter a Middle Initial value due to the data field being optional, this column will display a double dash (--).
 - The corresponding Spanish translation will exist in the Client Portal:
 - Inicial del segundo nombre

Feature Updates: Sprint 21

Agency Portal Client Pages Tabular Format Relationships Screen Enhancement Cont.

- Last Name
 - This column will display the Last Name value, sourced from the mandatory, free text 'Last Name' field, on the Add Relationship Record pop up.
 - The corresponding Spanish translation will exist in the Client Portal:
 - Apellido
- Date of Birth
 - This column will display the Date of Birth value, sourced from the mandatory, calendar 'Date of Birth' field, on the Add Relationship Record pop up.
 - Format: MM/DD/YYYY
 - The corresponding Spanish translation will exist in the Client Portal:
 - Fecha de Nacimiento
- Age
 - This column will display the Age value, calculated by the System, based on the Date of Birth value entered, on the Add Relationship Record pop up.
 - The corresponding Spanish translation will exist in the Client Portal:
 - Edad
- Gender
 - This column will display the Gender value, sourced from the optional, single-select 'Gender' drop down, on the Add Relationship Record pop up.
 - If a User does not enter a Gender value due to the data field being optional, this column will display a double dash (--).
 - The corresponding Spanish translation will exist in the Client Portal:
 - Género
- Social Security Number
 - This column will display the Social Security Number value, sourced from the optional, free text 'Social Security Number' field, on the Add Relationship Record pop up.
 - If a User does not enter a Social Security Number value due to the data field being optional, this column will display a double dash (--).
 - The corresponding Spanish translation will exist in the Client Portal:
 - Número de Seguro Social

Feature Updates: Sprint 21

Agency Portal Client Pages Tabular Format Relationships Screen Enhancement Cont.

- Status
 - This column will display the 'Inactive' or 'Active' Status value, sourced from the optional, single-select 'Status' field, on the Add Relationship Record pop up.
 - The Status optional, single-select drop down will display the 'Active' pre-selected value, by default.
 - If a User does not enter a Status value, due to the data field being optional, this column will display a double dash (--).
 - The corresponding Spanish translation will exist in the Client Portal:
 - Estado
 - Values: Activo, Inactivo
- Does this person live with you?
 - This column will display the 'Yes' or 'No' value, sourced from the mandatory, 'Does this person live with you' question, on the Add Relationship Record pop up.
 - The corresponding Spanish translation will exist in the Client Portal:
 - ¿Vive esta persona con usted?
 - Values: Si, No
- Living Situation
 - This column will display the Living Situation value, sourced from the optional, single-select 'Living Situation' drop down, on the Add Relationship Record pop up.
 - This field will populate when the User indicates 'No' to the 'Does the person live with you?' question on the Add Relationship Record pop up.
 - If a User does not enter a Living Situation value, due to the data field being optional, this column will display a double dash (--).
 - The corresponding Spanish translation will exist in the Client Portal:
 - Situación de Vivienda
- Address Line 1
 - This column will display the Address Line 1 value, sourced from the optional, free text 'Address Line 1' field, on the Add Relationship Record pop up.
 - This field will populate when the User indicates 'No' to the 'Does the person live with you?' question on the Add Relationship Record pop up.
 - If a User does not enter an Address Line 1 value, due to the data field being optional, this column will display a double dash (--).
 - The corresponding Spanish translation will exist in the Client Portal:
 - Dirección
- Address Line 2
 - This column will display the Address Line 2 value, sourced from the optional, free text 'Address Line 2' field, on the Add Relationship Record pop up.
 - This field will populate when the User indicates 'No' to the 'Does the person live with you?' question on the Add Relationship Record pop up.
 - If a User does not enter an Address Line 2 value, due to the data field being optional, this column will display a double dash (--).
 - The corresponding Spanish translation will exist in the Client Portal:
 - Dirección, línea 2

Feature Updates: Sprint 21

Agency Portal Client Pages Tabular Format Relationships Screen Enhancement Cont.

- City
 - This column will display the City value, sourced from the optional, free text 'City' field, on the Add Relationship Record pop up.
 - This field will populate when the User indicates 'No' to the 'Does the person live with you?' question on the Add Relationship Record pop up.
 - If a User does not enter a City value, due to the data field being optional, this column will display a double dash (--).
 - The corresponding Spanish translation will exist in the Client Portal:
 - Ciudad
- State
 - This column will display the State value, sourced from the optional, single-select 'State' field, on the Add Relationship Record pop up.
 - This field will populate when the User indicates 'No' to the 'Does the person live with you?' question on the Add Relationship Record pop up.
 - If a User does not enter a State value, due to the data field being optional, this column will display a double dash (--).
 - The corresponding Spanish translation will exist in the Client Portal:
 - Estado
- County
 - This column will display the County value, sourced from the optional, free text 'County' field, on the Add Relationship Record pop up.
 - This field will populate when the User indicates 'No' to the 'Does the person live with you?' question on the Add Relationship Record pop up.
 - If a User does not enter a County value, due to the data field being optional, this column will display a double dash (--).
 - The corresponding Spanish translation will exist in the Client Portal:
 - Condado
- Zip Code
 - This column will display the Zip Code value, sourced from the optional, free text 'Zip Code' field, on the Add Relationship Record pop up.
 - This field will populate when the User indicates 'No' to the 'Does the person live with you?' question on the Add Relationship Record pop up.
 - If a User does not enter a Zip Code value, due to the data field being optional, this column will display a double dash (--).
 - The corresponding Spanish translation will exist in the Client Portal:
 - Código Postal
- Phone Number
 - This column will display the Phone Number value, sourced from the mandatory, free text 'Phone Number' field, on the Add Relationship Record pop up.
 - This field will populate when the User indicates 'No' or 'Yes' to the 'Does the person live with you?' question on the Add Relationship Record pop up.
 - The corresponding Spanish translation will exist in the Client Portal:
 - Número de teléfono
- Relationship Added On
 - This column will display the Date and Timestamp value the Client/User added the Relationship record via the Add Relationship Record pop up.
 - Format: MM/DD/YYYY, HH:MM:SS AM / PM

Feature Updates: Sprint 21

Agency Portal Client Pages Tabular Format Relationships Screen Enhancement Cont.

- Action
 - This column will display the 'Edit' and Delete' hyperlinked action buttons for the saved Relationship record.
 - When a User clicks on the 'Edit' action, the Add Relationship Record pop up will display with the pre-populated values, allowing the User to update the saved Relationship record.
 - When a User clicks on the 'Delete' action, the Relationship record will be deleted from the My Relationships and Client Relationships screens.
 - The 'History' hyperlink action button will display under the Actions column, for the respective Relationship record, on the Client Relationships screen of a Client's Profile.
 - *This feature will not be viewable nor clickable via the Application Workflow in both the Agency and Client Portals.*
- The following address columns will populate the Client's Physical Address information if 'Yes' is selected for the 'Does this person live with you?' question on the Add Relationship Record pop up. *If a Physical Address is not available for the Client, then the Mailing Address information will be used - Physical Address takes precedence if available for the Client.*
 - Address Line 1
 - Address Line 2
 - City
 - State
 - County
 - Zip Code
- The Add Relationships results tables will have the following export capabilities:
 - CSV
 - Excel
 - Word
 - PDF
- This enhancement will be applicable across all Application Types, including:
 - New Application
 - Recertification
 - Self-Attestation
 - Change Request
 - Referral
- The Client's saved Relationship record(s) will display on the Application Review Summary screen of an Application Workflow, and the Application History screen's Accessible View and Download PDF actions of a Client's Profile.
- This enhancement is applicable to both the Application Workflow and Client's Profile in both the Agency and Client Portals.

Feature Updates: Sprint 21

Agency Portal Client Pages Tabular Format Relationships Screen Enhancement Cont.

Add Relationship Record Pop Up on My Relationships and Client Relationships Screens

Relationship *

Father

Status

Active

First Name *

Joe

Last Name *

Smith

Middle Initial

Date of Birth *

09/01/1977

Social Security Number

XXXX-XX-XXXX

Gender

Male

Does this person live with you? *

☒ No ☐ Yes

Living Situation

Hospital or Other Medical Facility

Address Line 1

123 Test Dummy Ln

Address Line 2

City

Houston

State

TEXAS

County

Harris

Zip Code

77008

Phone Number *

(123) 456-9876

Save Changes

Cancel

Feature Updates: Sprint 21

Agency Portal Client Pages Tabular Format Relationships Screen Enhancement Cont.

Saved Relationship Record on My Relationships Screen

My Relationships

My Relationship Details

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

Marital Status

What is your current Marital Status? *

Married/Common Law

Household Details

Do other people live in your home? *

No

Yes

How many people, including yourself, live in your home?

How many of the Client's biological children, adopted children, or stepchildren (age 17 years and younger) live with the Client?

How many people are living with HIV in your home?

Household Members

Please add information for each person in your household. If you are adding your spouse, provide their medical insurance information to help see if you may qualify for additional services. Users may not be able to delete household member records as the ability to delete a household member is restricted to specific User Roles.

Add a Household Member

Relationship	First Name	Middle Initial	Last Name	Date Of Birth	Age	Gender	Social Security Number	Status	Does the person live with the Client?	Living Situation	Address Line 1	Address Line 2	City	State	County	Zip Code	Phone Number	Relationship Added On	Actions
Ex-Partner	Alex	---	TESI	09/01/2004	20	---	---	Active	No	Rental housing	123 Test Dr	---	TX	TEXAS	Harris	77003	(545) 345-3553	10/09/2024 5:14:51 PM	EditDelete

Showing rows 1 to 1 of 1

Back

Save & ExitContinue

Feature Updates: Sprint 21

Agency Portal Client Pages Tabular Format Relationships Screen Enhancement Cont.

Saved Relationship Record on Client Relationships Screen

Client Relationships

Relationship Details

Note: All fields marked * are required.

Marital Status

What is the Client's current Marital Status? *

Cohabitation

Household Details

Do other people live in the Client's home? *

No

Yes

How many people, including the Client, live in their home?

How many of the Client's biological children, adopted children, or stepchildren (age 17 years and younger) live with the Client?

How many people are living with HIV in the Client's home?

Household Members

Please add information for each person in the Client's household. If you are adding a spouse, provide their medical insurance information to help see if the Client may qualify for additional services. Users may not be able to delete household member records as the ability to delete a household member is restricted to specific User Roles.

Relationship Detail History

Add a Household Member

Relationship	First Name	Middle Initial	Last Name	Date Of Birth	Age	Gender	Social Security Number	Status	Does the person live with the Client?	Living Situation	Address Line 1	Address Line 2	City	State	County	Zip Code	Phone Number	Relationship Added On	Actions
Ex-Partner	Alex	---	TEST	10/08/2024	0	---	---	Active	No	---	---	---	---	---	---	---	(345) 345-2342	10/09/2024 1:00:13 PM	Edit Delete History

15

Showing rows 1 to 1 of 1

Save Changes

Feature Updates: Sprint 21

Client Portal Spanish Translation Updates in Client Portal

When a TCT User navigates to the Client Portal Help Center, in Spanish, the following enhancements will occur:

- The following screens will have updated Spanish translations, including:
 - Help Center Landing Page
 - Basic Information
 - Applying for Services
 - Renewing Services
 - Troubleshooting
 - Privacy
- These Spanish translations apply to both the Parent and Child categories/sub-categories.
- This enhancement will be applicable to the Client Portal only.

Help Center Landing Page Spanish Translations

Centro de ayuda

Use palabras clave para buscar las respuestas que necesita

Ingrese una palabra clave para buscar

O escoja un tema



Información Básica



Solicitar Servicios



Renovación de Servicios



Solución de Problemas



Privacidad



Reportar un Cambio

Feature Updates: Sprint 21

Client Portal Spanish Translation Updates in Client Portal Cont.

Basic information Screen Spanish

TEXAS
Health and Human
Services

Texas Department of State
Health Services

AYUDA

ENGLISH

INICIAR SESIÓN

Volver al buscador

Información Básica

Configuración de Cuenta

Información Sobre Beneficios

Configuración de la Cuenta

Información General

Configuración de Cuenta

¿Puedo pedirle a alguien que me ayude a completar mi solicitud?

Si. Con su consentimiento, alguien puede ayudarlo a llenar su solicitud. Recordatorio: su nombre de usuario y contraseña deben mantenerse confidenciales. Si tiene dificultades para completar su solicitud y necesita ayuda, por favor envíe un correo electrónico a TCTClientHelp@DSHS.texas.gov. Si conoce a su proveedor, puede comunicarse con ellos directamente.

¿Puedo cambiar el correo electrónico que usé para crear mi cuenta?

Si. Una vez que inicie sesión y después de enviar una solicitud inicial, podrá cambiar su correo electrónico desde la página 'Mi Cuenta'

¿Qué es una pregunta de seguridad?

Una pregunta de seguridad es una pregunta utilizada para autenticar su identidad, para la cual proporcionó la respuesta al configurar su cuenta. Se le pedirá que responda a su pregunta de seguridad al realizar acciones como cambiar su contraseña.

¿Con qué frecuencia debo enviar documentos?

Deberá enviar documentos durante: • Su solicitud inicial • Actualización Anual • Revisión de 6 Meses Recibirá recordatorios sobre las fechas de vencimiento próximas en su portal.

¿Estarán disponibles todos mis registros médicos en el portal?

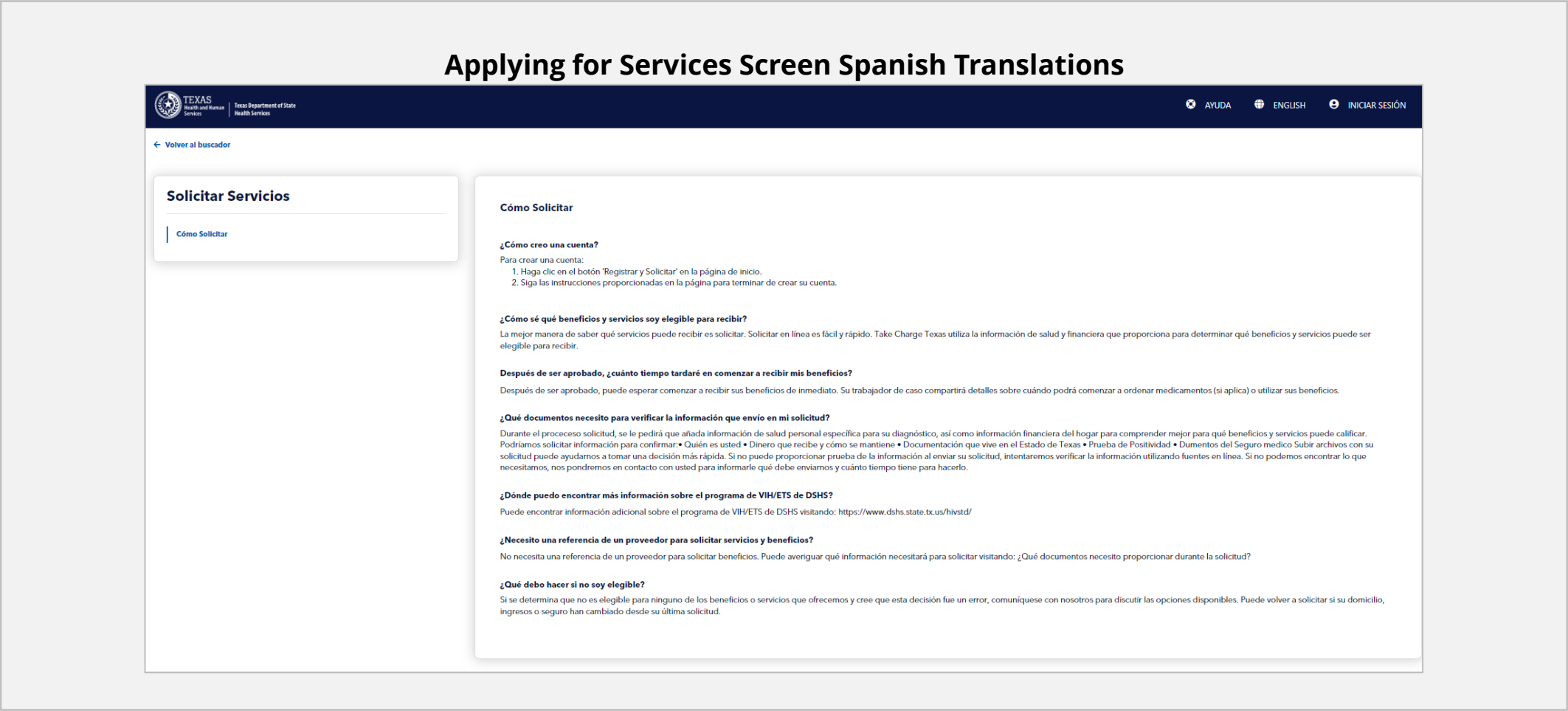
No, solo la información sobre los servicios y beneficios que recibe estará disponible a través del Portal del Cliente. Para cualquier otra información médica, por favor, contacte a su proveedor o médico.

¿Puedo cambiar mi nombre de usuario en algún momento?

No, no puede cambiar su nombre de usuario después de crear su cuenta. Anote su nombre de usuario para referencia futura. No comparta su nombre de usuario ni su contraseña con nadie más.

Feature Updates: Sprint 21

Client Portal Spanish Translation Updates in Client Portal Cont.



Renewing Services Screen Spanish Translations

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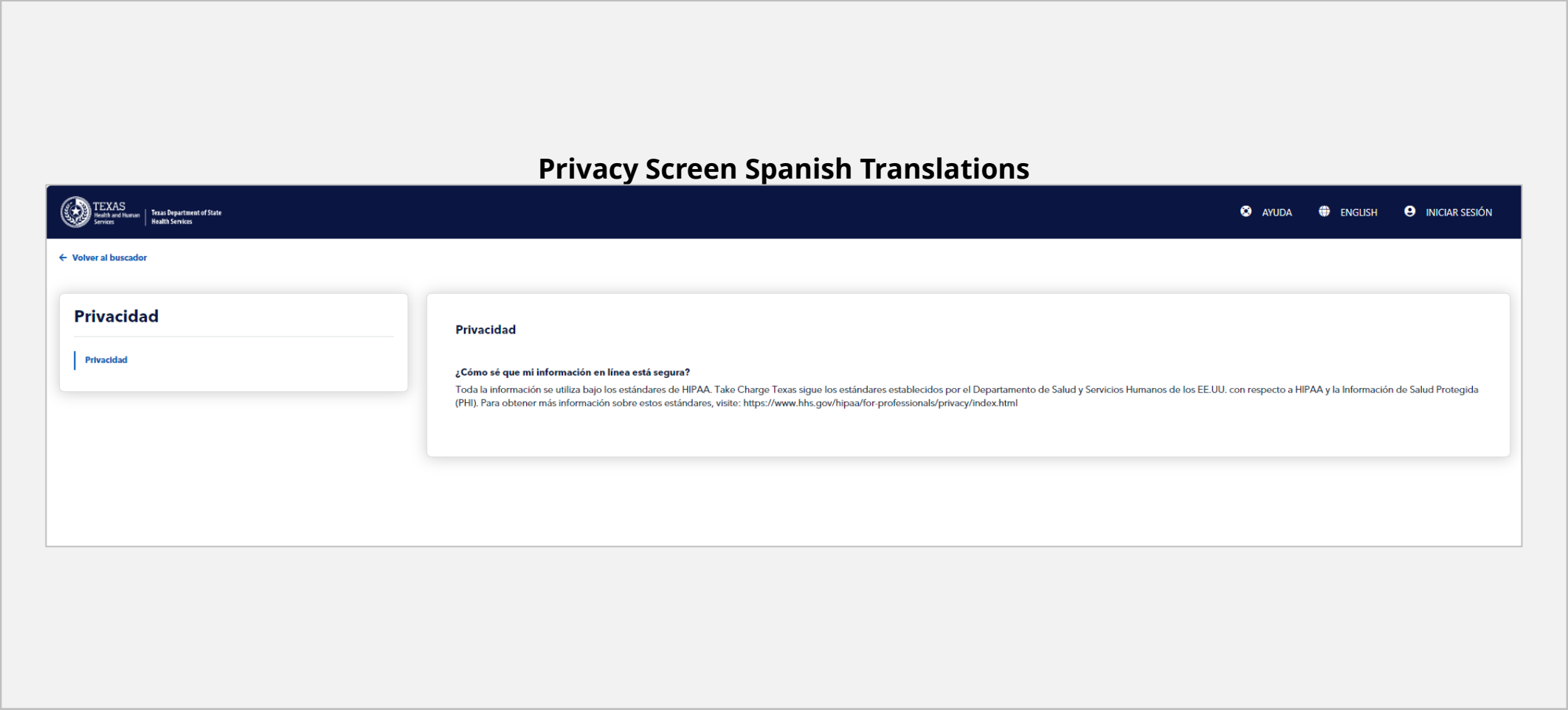
Feature Updates: Sprint 21

Client Portal Spanish Translation Updates in Client Portal Cont.



Feature Updates: Sprint 21

Client Portal Spanish Translation Updates in Client Portal Cont.



Feature Updates: Sprint 21

Reports Client Merge & Duplicate Client Identification Report HSDA & Hyperlink Enhancements

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

- When a User lands on the Client Merge Report, the following search criteria will display on the Client Merge Report screen:
 - HSDA
 - This will be an optional, multi-select drop down of applicable HSDA value(s).
 - **Pre-Condition:** In order to search for an HSDA(s), the User will first need to select an agency via the 'Agency Or Administrative Agency' optional, single-select drop down. Once an agency is selected, the associated HSDA value(s) will then display/be available for selection under the 'HSDA' search field.

Client Merge Report HSDA Search Criteria

Client Merge Report

Start Date *

01/05/2024

End Date *

10/08/2024

Merged ClientId

Merged By

Agency Or Administrative Agency

Super BVCOG

HSDA

4801 - Brazos Valley Council of Governments-Amarillo
HSDA
4803 - Brazos Valley Council of Governments-Wichita Falls
HSDA

✕ Clear

🔍 Search

Feature Updates: Sprint 21

Reports Client Merge & Duplicate Client Identification Report HSDA & Hyperlink Enhancements Cont.

- Per the enhancement, after the User enters both Agency and HSDA search criteria, and clicks on the ‘Search’ button, the Client Merge Report’s results table will render, displaying the new ‘HSDA’ column.
 - This column will appear to the right of the existing ‘Original Client ID 2’ column.
 - This column will display the HSDA value associated to the Merged Client ID.
 - The ‘Merged Client ID’ value will be hyperlinked to route the User to the Client’s Dashboard.
- This enhancement is applicable to the Agency Portal only.

Client Merge Report Results Table

Merged Client ID	Original Client ID 1	Original Client ID 2	HSDA	Merged By	Merge Date	Status	Exception Message
431762	431594	108531	4803 - Brazos Valley Council of Governments-Wichita Falls HSDA	SYSTEM	01/06/2024	Complete	
432212	432113	114424	4803 - Brazos Valley Council of Governments-Wichita Falls HSDA	SYSTEM	01/20/2024	Complete	
432215	432203	102691	4801 - Brazos Valley Council of Governments-Amarillo HSDA	SYSTEM	01/20/2024	Complete	
432633	417081	432599	4801 - Brazos Valley Council of Governments-Amarillo HSDA	SYSTEM	02/03/2024	Complete	
433828	209852	264700	4801 - Brazos Valley Council of Governments-Amarillo HSDA	SYSTEM	03/16/2024	Complete	
434042	433940	174934	4801 - Brazos Valley Council of Governments-Amarillo HSDA	SYSTEM	03/23/2024	Complete	
435225	162450	251462	4801 - Brazos Valley Council of Governments-Amarillo HSDA	00000356966	04/30/2024	Complete	

Feature Updates: Sprint 21

Reports Client Merge & Duplicate Client Identification Report HSDA & Hyperlink Enhancements Cont.

- When a TCT User navigates to the Reports in the Agency Portal, the following enhancements will occur:
- When a User lands on the Duplicate Client Identification Report, the following search criteria will display on the Duplicate Client Identification Report screen:
 - HSDA
 - This will be an optional, multi-select drop down of applicable HSDA value(s).
 - **Pre-Condition:** In order to search for an HSDA(s), the User will first need to select an agency via the 'Agency Or Administrative Agency' optional, single-select drop down. Once an agency is selected, the associated HSDA value(s) will then display/be available for selection under the 'HSDA' search field.

Duplicate Client Identification Report HSDA Search Criteria

Duplicate Client Identification

Search Criteria

Client Name

Client Id

Agency Or Administrative Agency

Super BVCOG x ▾

HSDA

4801 - Brazos Valley Council of Governments-Amarillo x

HSDA

4803 - Brazos Valley Council of Governments-Wichita Falls x x ▾

HSDA

Feature Updates: Sprint 21

Reports Client Merge & Duplicate Client Identification Report HSDA & Hyperlink Enhancements Cont.

- Per the enhancement, after the User enters both Agency and HSDA search criteria, and clicks on the ‘Search’ button, the Duplicate Client Identification Report’s results table will render, displaying the new ‘HSDA’ column.
 - This column will appear to the right of the existing ‘Client2 County’ column.
 - This column will display the HSDA value associated to the Duplicate Client Profiles.
 - The ‘Client ID 1’ and ‘Client ID 2’ values will be hyperlinked to route the User to the Clients’ Dashboards.
- This enhancement is applicable to the Agency Portal only.

Duplicate Client Identification Report Results Table

Duplicate Client Identification

Search Criteria

Client Name

Client ID

Agency Or Administrative Agency

HSDA

4801 - Brans Valley Council of Governments Annette HSDA x 4803 - Brans Valley Council of Governments Wichita Falls HSDA x

Search

Clear

Client ID 1	Client ID 2	Client Name 1	Client Name 2	Client DOB 1	Client DOB 2	Client SSN 1	Client SSN 2	Client T1N 1	Client T1N 2	TeamID1.1	TeamID1.2	Matching Field	Matching Value	Client County	Client County	HSDA	Select
112867	146351	Antonio Calabrese	Antonio Calabrese	02/11/1958	02/11/1958							Primary/Phone/Lurber	050626411			4801 - Brans Valley Council of Governments Annette HSDA	Yes No
112312	141501	Antonio Perez	Antonio Perez	06/11/1928	06/11/1928	525541899	525541899					Primary/Phone/Lurber	0501118209			4801 - Brans Valley Council of Governments Annette HSDA	Yes No
414955	251276	Barter Braxen	Barter Braxen	08/12/1910	08/12/1910	418110148	418110148					Primary/Phone/Lurber	0505854445			4801 - Brans Valley Council of Governments Annette HSDA	Yes No
403136	198915	David Good	David Good	10/16/1989	10/16/1989	889516191	889516191					Primary/Phone/Lurber	1701121475			4801 - Brans Valley Council of Governments Annette HSDA	Yes No
1149102	1989102	Dominique Johnson	Dominique Johnson	02/14/1992	02/14/1992	405411895	405411895					Primary/Phone/Lurber	0504171126			4801 - Brans Valley Council of Governments Annette HSDA	Yes No
4134115	198522	Julius Kim	Julius Kim	09/02/1986	09/02/1986	121628176	121628176					Primary/Email	hnm402@com.com			4801 - Brans Valley Council of Governments Wichita Falls HSDA	Yes No
1113194	1020017	Francisco Valenzuela	Francisco Valenzuela	08/01/1990	08/01/1990							Primary/Phone/Lurber	0501101495			4801 - Brans Valley Council of Governments Annette HSDA	Yes No

Feature Updates: Sprint 21

Reports Dropped THMP-ADAP Clients Report

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

- A new Scheduled Report, titled '**THMP Program Dropped Clients Report**', will populate in the results table on the Search and View Reports screen.

- The following User Roles will have access to the THMP Program Dropped Clients Report, including:
 - HRAR Admin
 - *HRAR Admin Users will have the ability to update the User Roles via the Role to Screen Mapping feature.*
 - DSHS Program Staff

THMP Program Dropped Clients Scheduled Report

Search and View Reports

Search

Title

THMP

Type

Pick an option

Q Search

X Clear Search

Reports

THMP Program Dropped Clients Report

Scheduled

- Upon the User clicking on the 'THMP Program Dropped Clients Report' hyperlink, the User will be routed to the THMP Program Dropped Clients Report screen to generate the report.
- The following search criteria will display on the THMP Program Dropped Clients Report screen, including:
 - Start Date
 - This will be a mandatory, calendar field.
 - Format: MM/DD/YYYY
 - End Date
 - This will be a mandatory, calendar field.
 - Format: MM/DD/YYYY

Feature Updates: Sprint 21

Reports Dropped THMP-ADAP Clients Report Cont.

- If a User indicates a date range greater than 90 days and clicks on the 'Search' button, the following validation message will display on the top banner of the THMP Program Dropped Clients Report screen, stating:
 - "The date range you entered is larger than 90 days. Please enter a date range that is 90 days or less."
- The screenshot shows a web form titled "Generate Reports" with the subtitle "THMP Program Dropped Clients Report Criteria". At the top, a blue banner with a white 'i' icon contains the message: "The date range you entered is larger than 90 days. Please enter a date range that is 90 days or less." Below this, the form has two date input fields: "Start Date" with the value "05/09/2024" and "End Date" with the value "10/07/2024". At the bottom right are "Search" and "Reset" buttons, and at the bottom left is a "Back" button.
- The THMP Program Dropped Clients Report screen will include the following action buttons:
 - Search
 - When a User clicks on the 'Search' button, after entering the mandated search criteria identified above, the respective data will then render in the results table on the THMP Program Dropped Clients Report screen.
 - Reset
 - When a User clicks on the 'Reset' button, after entering the mandated search criteria identified above, the search criteria fields (*Start Date and End Dates*) will be cleared out/reset on the THMP Program Dropped Clients Report screen.
 - **Pre-Condition:** On the 1st of every month, the TCT System will perform the On Hold Batch for THMP-ADAP Client(s) who failed to submit their Recertification / Self-Attestation application(s) after their Eligibility End Date(s) and have been placed on Recertification / Self-Attestation Hold(s).
 - **Post-Condition:** On the 5th of every month, the TCT System will then perform the Dropped Batch which will then drop the applicable THMP-ADAP Client(s) (*the Clients currently On Hold*) from the THMP Program.
 - The THMP Dropped Clients Report results table will have the following columns and System generated values:
 - Generated Date
 - This column will display the 5th day of the particular month in which the Dropped Batch file ran.
 - Format: XX/05/YYYY
 - Report
 - This column will display the 'THMP Program Dropped Clients Report' value for the applicable data record(s) rendered.
 - Value: THMP Program Dropped Clients Report
 - Format
 - This column will display either the 'XLS' or 'PDF' value, as separate rows, for the applicable data record(s) rendered.
 - Action
 - This column will display the 'View' hyperlinked action button(s) for the applicable data record(s) rendered.

Feature Updates: Sprint 21

Reports Dropped THMP-ADAP Clients Report Cont.

THMP Program Dropped Clients Report Results Table

Generate Reports

THMP Program Dropped Clients Report Criteria

Start Date *

09/26/2024

End Date *

10/07/2024

Search

Reset

Reports

CSVXLSPDF

Generated Date	Report	Format	Action
10/03/2024	THMP Program Dropped Clients Report	PDF	View
10/03/2024	THMP Program Dropped Clients Report	XLS	View
10/04/2024	THMP Program Dropped Clients Report	PDF	View
10/04/2024	THMP Program Dropped Clients Report	XLS	View

10

Showing rows 1 to 4 of 4

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Feature Updates: Sprint 21

Reports Dropped THMP-ADAP Clients Report Cont.

- The report outputs (*PDF and XLS*) will include the following columns and System generated values, including:
 - Client ID:
 - Upon the Dropped Batch running, on the 5th day of the month, this column will display the applicable Client ID(s), for the Client Record(s) rendered, who were dropped/auto-denied from the THMP Program.
 - Client Name
 - Upon the Dropped Batch running, on the 5th day of the month, this column will display the applicable Last Name and First Name value(s), for the Client Record(s) rendered, who were dropped/auto-denied from the THMP Program.
 - Client DOB
 - Upon the Dropped Batch running, on the 5th day of the month, this column will display the applicable Date of Birth value(s), for the Client Record(s) rendered, who were dropped/auto-denied from the THMP Program.
 - THMP Subprogram
 - Upon the Dropped Batch running, on the 5th day of the month, this column will display the 'ADAP' value(s), for the Client Record(s) rendered, who were dropped/auto-denied from the THMP Program.
 - Values: ADAP
 - Dropped On
 - This column will display the date the Dropped Batch file ran to drop/auto-deny the rendered Client(s) from the THMP Program.
 - Format: XX/05/YYYY
 - *The Dropped Batch will run on the 5th day of every month.*
 - Dropped By
 - This column will display the 'DropBatchService' value, for the Client Record(s) rendered, who were dropped/auto-denied from the THMP Program.
 - Value: DropBatchService
- The System conditions must be met for the Dropped Batch file to drop/auto-deny Clients from the THMP Program.
- The Client must re-apply to begin receiving THMP services/benefits if dropped from the THMP Program.
- This enhancement will be applicable to the Agency Portal only.

Feature Updates: Sprint 21

Reports Dropped THMP-ADAP Clients Report Cont.

THMP Program Dropped Clients PDF Report Output



Texas Department of State
Health Services

THMP TakeChargeTexas

THMP Program Dropped Clients Report

Generated On : 10/3/2024

Client ID	Client Name	Client DOB	THMP Subprogram	Dropped On	Dropped By
438005	clientone, autodrop	02-01-1980	ADAP	10-03-2024	DropBatchService

Feature Updates: Sprint 21

Reports Client Inactivation Report

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

- A new report/hyperlink, titled '**Client Inactivation Report**', will display under the Reports drop down, beneath the existing 'Client Eligibility Status Search Report'.
- The Client Inactivation Report will be accessible to the following User Roles:
 - HRAR Admin
 - DSHS Program Staff
 - Agency Client Services Supervisor / Manager
 - AA Data Managers
 - AA Program Staff
 - Agency Client Services Staff
- The Client Inactivation Report screen will have the following search criteria, including:
 - Client ID
 - This will be an optional, free text field accepting numeric values only.
 - User Name
 - This will be an optional, multi-select drop down displaying the User Names of the Users in the TCT System.
 - Format: First Name, Last Name (User Name)
 - HRAR Admin Users will have the ability to view and select all User Names, of all Users, in the TCT System due to their elevated permissions.
 - Agency Client Services Staff Users will only be able to select their associated 'User Name' record due to their limited permissions.
 - All other User Roles will only see the User Name(s) of the User(s) who fall under their associated agency(ies).
 - *The 'User Name' logic will be determined based on the User Role(s) of the User logged in.*
 - Inactivation Start Date
 - This will be an optional, calendar field.
 - Format: MM/DD/YYYY
 - Inactivation End Date
 - This will be an optional, calendar field.
 - Format: MM/DD/YYYY

Feature Updates: Sprint 21

Reports Client Inactivation Report Cont.

- The Client Inactivation Report screen will have the following action buttons:
 - Clear
 - When a User clicks on the 'Clear' button, the User's search criteria will be reset on the Client Inactivation Report screen.
 - Search
 - When a User clicks on the 'Search' button, the System will then render the applicable Client Record(s) in the Client Inactivation Report results table.
- Upon the User clicking on the 'Search' button, after entering search criteria on the Client Inactivation Report screen, the applicable Client Record(s), deemed inactivated, will then render in the results table with the following columns and System generated values:
 - Client ID
 - This column will display the Client ID value(s) for the applicable Client Record(s) rendered.
 - The Client ID value(s) will be hyperlinked to route the User to the Client's Dashboard.
 - Client Name
 - This column will display the Last Name, First Name value(s) for the applicable Client Record(s) rendered.
 - Client DOB
 - This column will display the Date of Birth value(s), for the applicable Client Record(s) rendered, sourced from the Client Profile(s).
 - Client SSN
 - This column will display the Social Security Number value(s), for the applicable Client Record(s) rendered, sourced from the Client Profile(s).
 - Client Status
 - This column will display the 'Inactive' value(s) for the applicable Client Record(s) rendered, sourced from the Edit Client Profile screen(s).
 - *This is due to the report only rendering Client Records flagged as Inactive in the TCT System.*
 - Value: Inactive
 - Inactive Type
 - This column will display either the 'Other Inactive' or 'Deceased' value(s), for the applicable Client Record(s) rendered, sourced from the Edit Client Profile screen(s).
 - Values: Other Inactive, Deceased
 - Client Date of Death
 - This column will display the Date of Death value(s), for the applicable Client Record(s) rendered, sourced from the Edit Client Profile screen(s).
 - If a Client Record is not identified as 'Deceased', this column will display a double dash (--).
 - Inactivated On
 - This column will display the Date and Timestamp value(s), sourced from the Edit Client Profile screen(s), for the applicable Client Record(s) rendered, for the inactivation action(s) performed by the User(s).

Feature Updates: Sprint 21

Reports Client Inactivation Report Cont.

- Inactivated By
 - This column will display the Last Name and First Name value(s), sourced from the Edit Client Profile screen(s), for the applicable Client Record(s) rendered, for the inactivation action(s) performed by the User(s).
 - Format: Last Name, First Name (User Name)
- The Client Inactivation Report will have the following export capabilities, including:
 - CSV
 - Excel
 - Word
 - PDF
- The Client Inactivation Report will be applicable to the Agency Portal only.

Client Inactivation Report Screen/Results Table

TEXAS

Health and Human Services

Texas Department of State Health Services

HELPHOME

NOTIFICATIONS

REMINDER

TASKS

CLIENT SEARCH

LOGOUT

Back to dashboard

Reports

Client Inactivation Report

Client ID

User Name

Inactivation Start Date

Inactivation End Date

admin.admin (test@vadmin)

MM/DD/YYYY

Clear

Search

Client ID

Client Name

Client DOB

Client SSN

Client Status

Inactive Type

Client Date of Death

Inactivated On

Inactivated By

124135

Burns, Brandon

02/02/1985

111135245

Inactive

Other Inactive

10/04/2024 2:05:43 PM

admin.admin(HRAR_ADMIN)

254039

Dirocco, Alonzo

12/22/1962

111264841

Inactive

Other Inactive

09/26/2024 9:39:12 AM

admin.admin(HRAR_ADMIN)

403561

Bennet, Alleja

09/12/1999

111280775

Inactive

Deceased

09/30/2024

10/04/2024 8:03:01 AM

admin.admin(HRAR_ADMIN)

434093

Green, Cindy

07/07/1988

Inactive

Deceased

09/12/2024

09/12/2024 1:08:10 PM

admin.admin(HRAR_ADMIN)

437935

CARE, Alex

09/08/1972

Inactive

Other Inactive

09/30/2024 3:25:55 PM

admin.admin(HRAR_ADMIN)

438021

Relationship, Alex

09/01/2003

Inactive

Other Inactive

10/04/2024 10:26:35 AM

admin.admin(HRAR_ADMIN)

438023

RelationshipTrio, Alex

09/08/1970

Inactive

Other Inactive

10/04/2024 12:39:47 PM

admin.admin(HRAR_ADMIN)

Showing rows 1 to 7 of 7

1

Feature Updates: Sprint 21

Application Workflow Addition of Authorized Release Enhancement to Application Workflow

When a TCT User navigates through an Application Workflow, the following enhancements will occur:

- A new section, titled **'Authorization For Release of Information'**, will appear after the existing 'About Me' section.
 - The corresponding Spanish translation will exist in the Client Portal:
 - Autorización Para la Divulgación de Información
- The following Help Text will display beneath the 'Authorization For Release of Information' title:
 - "You may authorize one or more representatives to communicate with DSHS regarding the information included in your application."
 - The corresponding Spanish translation will exist in the Client Portal:
 - "Usted puede autorizar a un representante a comunicarse con DSHS con respecto a la informacion incluida en esta solicitud."
- On the Authorization For Release of Information screen, the following action button will display:
 - Add Authorized Person
 - The corresponding Spanish translation will exist in the Client Portal:
 - Añadir persona autorizada
- When a User clicks on the 'Add Authorized Person' button, the Authorized Release Details Record pop up will display with the following search criteria:
 - First Name
 - Spanish translation: Nombre
 - This will be an optional, free text field.
 - Last Name
 - Spanish translation: Apellido
 - This will be an optional, free text field.
 - Organization
 - Spanish translation: Organización
 - This will be an optional, free text field.
 - Relationship
 - Spanish translation: Relación
 - This will be an optional, single-select drop down.
 - *The picklist values that display will be sourced from the My Relationships screen.*
 - Phone Number
 - Spanish translation: Número de teléfono
 - This will be an optional, free text field accepting numeric values only.
 - *Max character limit of 10 digits*

'Authorization For Release of Information' Section in Application Workflow (Applicable to both Agency and Client Portals)

Learn More	🔗
Emergency Screening	✓
My Needs	✓
About Me	✓
Authorization For Release of Information	✓
My Relationships	✓
My Health	✓
My Income	
My Insurance	
My Documents	
Agency Selection	
Review Application	
Certify and Submit	
Success	

Feature Updates: Sprint 21

Application Workflow Addition of Authorized Release Enhancement to Application Workflow Cont.

- Date Received
 - Spanish translation: Fecha Recibida
 - This will be an optional, calendar field.
 - Format: MM/DD/YYYY
- Verification Received?
 - Spanish translation: Verificación recibida
 - This will be an optional, check box field.
- Status
 - Spanish translation: Estado
 - This will be an optional, single-select drop down.
 - Values: Active (*default, pre-selected value*), Inactive
 - Spanish translations: Activo, Inactivo
- The Authorized Release Details Record pop up(s) will include the following action buttons:
 - Save
 - When a User inputs the optional field(s) identified above and clicks on the 'Save' button, via the Authorized Release Details Record pop up(s), the Authorized Release record(s) will save successfully in the Authorization For Release of Information screen's results table.
 - Cancel
 - When a User clicks on the 'Cancel' button, via the Authorized Release Details Record pop up(s), the Authorized Release record(s) will not save successfully in the Authorization For Release of Information screen's results table.
- Once a User has successfully added/saved an Authorized Release record(s) via the Authorized Release Details Record pop up(s), the applicable record's values will then display in the Authorization For Release of Information results tables, displaying the following columns and System generated values:
 - First Name
 - This column will display the First Name value(s), sourced from the 'First Name' field(s), on the Authorized Release Details Record pop up(s), for the respective Authorized Release record(s).
 - Last Name
 - This column will display the Last Name value(s), sourced from the 'Last Name' field(s), on the Authorized Release Details Record pop up(s), for the respective Authorized Release record(s).
 - Organization
 - This column will display the Organization value(s), sourced from the 'Organization' field(s), on the Authorized Release Details Record pop up(s), for the respective Authorized Release record(s).
 - Relationship
 - This column will display the Relationship value(s), sourced from the 'Relationship' field(s), on the Authorized Release Details Record pop up(s), for the respective Authorized Release record(s).
 - Phone Number
 - This column will display the Phone Number value(s), sourced from the 'Phone Number' field(s), on the Authorized Release Details Record pop up(s), for the respective Authorized Release record(s).

Feature Updates: Sprint 21

Application Workflow Addition of Authorized Release Enhancement to Application Workflow Cont.

- Users can add multiple Authorized Release records on the Authorization For Release of Information screen.
- Users will have the ability to Edit and Delete the respective Authorized Release record(s) by clicking on the 'Edit' and 'Delete' hyperlinked action buttons, found under the Actions column, in the Authorization For Release of Information results table.
 - When a User clicks on the 'Edit' action button for the respective Authorized Release record(s), in the Authorization For Release of Information results table, the Authorized Release Details Record pop up will display with the pre-populated value(s), allowing the ability for the User to update the record's information.
 - When a User clicks on the 'Delete' action button for the respective Authorized Release record(s), in the Authorization For Release of Information results table, the Authorized Release record(s) will be successfully deleted from the Authorization For Release of Information screen.
- The Client's saved Authorized Release record(s) will be saved in both the Application Workflow and Client's Profile.
 - Users will see a viewable and clickable 'History' action button on the Authorization For Release of Information screen of a Client's Profile, for the respective Authorized Release record(s), saved in a Client's application.
 - *This enhancement is applicable to the Agency Portal (Client's Profile) only.*
- This enhancement is applicable across all Application Types, including:
 - New Application
 - Recertification
 - Self-Attestation
 - Change Request
 - Referral
- The Client's saved Authorized Release record(s) will display on the Application Review Summary screen of an Application Workflow, and the Application History screen's Accessible View and Download PDF actions of a Client's Profile.
- This enhancement is applicable to both the Application Workflow and Client's Profile in both the Agency and Client Portals.

Authorized Release Details Record Pop Up

Authorized Release Details Record

First Name	Last Name	Organization
Relationship	Phone Number	Date Received
Select	(###) ###-####	MM/DD/YYYY
☐ Verification Received?		
Status		
Active		

Feature Updates: Sprint 21

Application Workflow Addition of Authorized Release Enhancement to Application Workflow Cont.

Application Workflow Authorization For Release of Information Screen/Results Table

Authorization For Release of Information

You may authorize one or more representatives to communicate with DSHS regarding the information included in your application.

Add Authorized Person

CSVXWPDF

First Name	Last Name	Organization	Relationship	Phone Number	Verification Received?	Date Received	Status	Actions
Test	Tester	Org123	Grandfather	(123) 345-3433	YES	10/05/2024	Active	EditDelete

15Showing rows 1 to 1 of 1

Back

Save & ExitContinue

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Feature Updates: Sprint 21

Application Workflow Addition of Authorized Release Enhancement to Application Workflow Cont.

Client’s Profile Authorization For Release of Information Screen/Results Table

Authorization For Release of Information

You may authorize one or more representatives to communicate with DSHS regarding the information included in your application.

Add Authorized Person

First Name	Last Name	Organization	Relationship	Phone Number	Verification Received?	Date Received	Status	Actions
bdbb	bbgb	fegrrgeg	Case Manager	5125465646	YES	10/03/2024	Active	Edit Delete History

15

Showing rows 1 to 1 of 1

1

Save Changes

Feature Updates: Sprint 21

Pharmacy Package Size Enhancements to Pharmacy Portal Screens

When a TCT User navigates to the below screens in the Agency Portal, the following enhancements will occur:

- A new column, titled '**Package Size**', will be added to the left of the existing 'Form' columns on the applicable screens/results tables, including:
 - Drug Search
 - Drug Regimen
 - Add Prescribed Drugs
 - Worker Portal Order
 - Order Details
 - Order Transfer
 - Review Order
 - Order Conflicts
 - Client Medication Order History
 - Order Overrides
 - Client Regimen Overrides
 - Shipment Resubmission Overrides
- The Package Size value(s) will be sourced from the 'Pkg Size' field(s) on the respective medication's Drug Details screen(s).
 - *When a User modifies the Package Size value(s) on the Drug Details screen(s), the applicable screens/results tables will reflect the updated value(s) in real-time.*
- This enhancement is applicable to the Agency Portal only.

Feature Updates: Sprint 21

Pharmacy Package Size Enhancements to Pharmacy Portal Screens Cont.

Package Size Column on Drug Search Screen

Drug Search

THMP Formulary

Drug Code

228

Trade Name ⓘ

Generic Name ⓘ

Search

New Drug

CSV

X

W

Drug Code	Trade Name	Generic Name	Dosage Strength	Measure	Package Size	Form	Count As	Status
228	EGRIFTA	tesamorelin acetate P/F	2	MG	30	INJ	0	Dropped

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Feature Updates: Sprint 21

Pharmacy Package Size Enhancements to Pharmacy Portal Screens Cont.

Package Size Column on Drug Regimen Screen

Prescribed Drugs

TX MD/DO License # *

Doctor Name:

Search Doctor

Add Prescription

Status

Active

CSV

X

W

Pharmacy Site Type	Pharmacy Name	Trade Name	Generic Name	Dosage Strength	Measure	Package Size	Form	Count As	Day Supply	Dosage Frequency	TX MD/DO License #	New Drug to Client?
Primary	394 - *NO NEW CLIENTS*CVS/pharmacy #6856	ETHAMBUTOL (100/btl)	Ethambutol	400	MG	100	TAB	0	30		CONV0002	

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Feature Updates: Sprint 21

Pharmacy Package Size Enhancements to Pharmacy Portal Screens Cont.

Package Size Column on Add Prescribed Drugs Screen

Add Prescribed Drug

Please Note: All medications require prescriptions written by an authorized prescriber, regardless of who enters the information in TCT. The prescriptions must be sent to the assigned pharmacy.

Search for drugs to add to client's drug regimen. Note: upon clicking add, the screen refreshes and saves to the regimen. If you wish to see the current regimen, click 'Rx Back'

Drug Code

Trade Name ⓘ

Generic Name ⓘ

Rx Back

Search

Search Results



Drug Code	Trade Name	Generic Name	Dosage Strength	Measure	Package Size	Form	Count As	Day Supply	Min Day Supply	Dosage Frequency	Status	Is the client new to this Drug?	Add Drug
8	VIDEX CHEWABLE	Didanosine (DDI)	100	MG	60	TAB CHEW	1	Day Supply *	30	Dosage Frequency	Dropped	Is the client new to this Drug? Select	+ Add

Feature Updates: Sprint 21

Pharmacy Package Size Enhancements to Pharmacy Portal Screens Cont.

Package Size Column on Worker Portal Order Screen

Worker Portal Order Screen

Use the filters below to populate the available medications available to order for clients. Selecting 'Add To Order' does not submit the order but only saves it to the open order. To start order submission, select the 'Review Order' button. Note: Pharmacists can only order for clients within their own pharmacy.

Client ID

Client First Name

Client Last Name

D.O.B.

MM/DD/YYYY

Pharmacy ID

97

Pharmacy Name

Client Status

Active

THMP Eligibility Status

Approved

THMP Subprogram

ADAP

Search

Clear Search

PDF

Excel

Print

Share

Pharmacy ID	Client ID	Client Name	D.O.B	Trade Name	Generic Name	Dosage Strength	Measure	Package Size	Form	Day Supply	Quantity	Last Order Date	Medicaid/CHIP ID	Min Day Supply	Select
97	266653	Contreras Sandoval Lemar	03/16/1982	EPIVIR (60/tbl)	Lamivudine (3TC)	Dosage Strength 150	MG	60	TAB	Day Supply 30	Quantity 1			30	Order Denial Reasons
97	266653	Contreras Sandoval Lemar	03/16/1982	VIREAD (30/tbl)	Tenofovir	Dosage Strength 300	MG	30	TAB	Day Supply 30	Quantity 1			30	Order Denial Reasons
97	266653	Contreras Sandoval Lemar	03/16/1982	TIVICAY (30/tbl)	dolutegravir sodium	Dosage Strength 50	MG	30	TAB	Day Supply 30	Quantity 1			30	Order Denial Reasons

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Feature Updates: Sprint 21

Pharmacy Package Size Enhancements to Pharmacy Portal Screens Cont.

Package Size Column on Order Details Screen

Order Details

Please wait until 3 business days from when the Status for this Order is updated to Shipped, to indicate the Order Status and Medication Shipment Information.

Client ID

Client First Name

Client Last Name

D.O.B.

Pharmacy ID

Pharmacy Name

Filter

Clear Filters

Order Received Status

Order Received Status Date

CSV

XLS

PDF

Print

Pharmacy ID	Trade Name	Generic Name	Dosage Strength	Measure	Package Size	Form	Day Supply	Quantity	Shipped Date	Tracking Number	Dispensed Date	Medication Shipment Received	Medication Received Date	Client ID	Client Name	D.O.B.	Medication Resubmitted	Resubmitted Order ID	Select
5	TRIUMEQ (30/btl)	Trimeq (abacavir/3TC/dolutegravir)	600;50;300	MG	30	TAB	30	1			Dispensed Date MM/	Medication Shipment Received Select	Medication Received Date MM/	406793	Johnson, Georgina	05/23/1976	--		☐

Feature Updates: Sprint 21

Pharmacy Package Size Enhancements to Pharmacy Portal Screens Cont.

Package Size Column on Order Transfer Screen

Order Transfer Screen

Download

Excel

Word

PDF

Pharmacy ID	Trade Name	Generic Name	Dosage Strength	Measure	Package Size	Form	Day Supply	Quantity	Quantity to be Transferred	Last Order Date	Client ID	Client Name	Transfer Recipient ID	Transfer Recipient Name	D.O.B
5	TRIUMEQ (30/btl)	Triumeq (abacavir/3TC/dolutegravir)	600;50;300	MG	30	TAB	30	1	Quantity to be Transferred	07/09/2024	406793	Johnson, Georgina	Search		05/23/1976

50

Showing rows 1 to 1 of 1

Back

Confirm Transfer

Feature Updates: Sprint 21

Pharmacy Package Size Enhancements to Pharmacy Portal Screens Cont.

Package Size Column on Review Order Screen

Review Order

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

Active Pharmacies

CSVXPDF

Pharmacy ID	Site Usage Designation	Trade Name	Generic Name	Dosage Strength	Measure	Package Size	Form	Day Supply	Quantity	Last Order Date	Medicaid/CHIP ID	Client ID	Client Name	D.O.B	Remove from Order?
105	Primary Participating Pharmacy	ISENTRESS (60/btl)	Raltegravir	400	--	60	TAB	30	1	01/09/2024		118043	Roberts, Joe	12/21/1963	Remove
105	Primary Participating Pharmacy	VIREAD (30/btl)	Tenofovir	300	--	30	TAB	30	1	05/15/2024		118043	Roberts, Joe	12/21/1963	Remove

50Showing rows 1 to 2 of 21

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).

CSVXPDF

Pharmacy ID	Reason for Non-Submission	Site Usage Designation	Trade Name	Generic Name	Dosage Strength	Measure	Package Size	Form	Day Supply	Quantity	Last Order Date	Medicaid/CHIP ID	Client ID	Client Name	D.O.B
There are no order line items for this order!															

50Showing rows 0 to 0 of 0

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Feature Updates: Sprint 21

Pharmacy Package Size Enhancements to Pharmacy Portal Screens Cont.

Package Size Column on Order Conflicts Screen

Order Conflicts

Medicines that failed the automated check appear below with denial reasons. You can either remove the conflicts or submit an override request with a reason. Note: Upon submitting all the requests, the non-conflicted order items will be sent to the warehouse in a separate order.

Pharmacy ID	Trade Name	Generic Name	Dosage Strength	Measure	Package Size	Form	Day Supply	Quantity	Last Order Date	Denial Reason	Client ID	Client Name	D.O.B	Reason for Override	Actions	Select
106	FLUCONAZOLE (50/100)	Fluconazole	200	MG	30	TAB COATED	30	1		Client shows active Medicaid, T10MP Staff must verify	135308	Williams, Alex	01/12/1978	Reason for Override *	Remove	☐
106	TRICAV (30/60)	dolutegravir sodium	50	MG	30	TAB	30	1	06/11/2024	Client shows active Medicaid, T10MP Staff must verify	135308	Williams, Alex	01/12/1978	Reason for Override *	Remove	☐

50

Showing rows 1 to 2 of 2

1

Back

Select All

Submit Override Request

Feature Updates: Sprint 21

Pharmacy Package Size Enhancements to Pharmacy Portal Screens Cont.

Package Size Column on Client Medication Order History Screen

Client Medicine Order History

CSVXWPDF

Pharmacy ID	Original Order ID	Medication Resubmitted	Resubmitted Order ID	Trade Name	Generic Name	Dosage Strength	Measure	Package Size	Form	Day Supply	Quantity	Original Order Submission Date	Order Resubmission Date	Dispense Date
There are no history orders for client!														

50

Showing rows 0 to 0 of 0

Feature Updates: Sprint 21

Pharmacy Package Size Enhancements to Pharmacy Portal Screens Cont.

Package Size Column on Order Overrides Screen

Order Overrides

Pharmacy ID	Pharmacy Dropped Date	Trade Name	Generic Name	Dosage Strength	Measure	Package Size	Form	Day Supply	Quantity	Last Order Date	Denial Reason	Client ID	Client Name	D.O.B	Reason for Override	Status	Approve/Deny	Select
45	09/09/2024	GENVOYA (30/bt)	Genvoya	150;200;10	MG	30	TAB	30	1	07/30/2024	Too early for a refill	102818	Albreo, Joshus	12/20/1969	TEST	Approved	✓ Approve ⊗ Deny	☐ Select
45	09/09/2024	Dovato (30/bt)	dolutegravir/lamivudine	50;300	MG/MG	30	TAB	30	1	07/11/2024	Too early for a refill	103115	Solis, Carlos	03/15/1978	test	--	✓ Approve ⊗ Deny	☐ Select
45	09/09/2024	AMLODIPINE (90/bt)	amlodipine	5	MG	90	TAB	90	1	--	Too early for a refill	103115	Solis, Carlos	03/15/1978	test	--	✓ Approve ⊗ Deny	☐ Select
326	--	ABACAVIR (60/bt)	Abacavir	300	MG	60	TAB	90	3	06/17/2024	Quantity has exceeded MaxPerMonth for Medication	114237	Tual, Pau	06/05/1980		--	✓ Approve ⊗ Deny	☐ Select
45	09/09/2024	BIKTARVY (30/bt)	bictegravir/emtricitabine/tenofovir ala	50;200;25	MG/MG/MG	30	TAB	30	1	07/30/2024	Too early for a refill	129566	Williams, Tracy	12/25/1992	TEST	--	✓ Approve ⊗ Deny	☐ Select
67	04/24/2026	Atorvastatin (90/bottle)	atorvastatin calcium	10	MG	90	TAB	90	1	06/05/2024	Too early for a refill	407802	Fernandez, Jacob	06/15/1998	transferred in batch 53703	--	✓ Approve ⊗ Deny	☐ Select
148	--	BIKTARVY (30/bt)	bictegravir/emtricitabine/tenofovir ala	50;200;25	MG/MG/MG	30	TAB	30	1	08/06/2024	Too early for a refill	437815	Deckowab, Michaab	05/04/1990	QA	--	✓ Approve ⊗ Deny	☐ Select
148	--	BIKTARVY (30/bt)	bictegravir/emtricitabine/tenofovir ala	50;200;25	MG/MG/MG	30	TAB	30	1	08/06/2024	Too early for a refill	437815	Deckowab, Michaab	05/04/1990	ww	--	✓ Approve ⊗ Deny	☐ Select
148	--	BIKTARVY (30/bt)	bictegravir/emtricitabine/tenofovir ala	50;200;25	MG/MG/MG	30	TAB	30	1	09/20/2024	Too early for a refill	437816	Bernhardab, Wilsonab	05/04/1990	ww	--	✓ Approve ⊗ Deny	☐ Select
148	--	BIKTARVY (30/bt)	bictegravir/emtricitabine/tenofovir ala	50;200;25	MG/MG/MG	30	TAB	30	1	09/20/2024	Too early for a refill	437816	Bernhardab, Wilsonab	05/04/1990	QA	--	✓ Approve ⊗ Deny	☐ Select
923	--	SMZ/TMP (100/bt)	SMZ/TMP	800;160	MG	100	TAB	30	1	--	Too early for a refill	437964	LastTestSep, LakUATSep	07/29/1990	override	--	✓ Approve ⊗ Deny	☐ Select

50 - Showing rows 1 to 11 of 11

[Submit Order](#)

Feature Updates: Sprint 21

Pharmacy Package Size Enhancements to Pharmacy Portal Screens Cont.

Package Size Column on Client Regimen Overrides Screen

Client Regimen Overrides

CSV

Excel

Word

PDF

Trade Name	Generic Name	Dosage Strength	Measure	Package Size	Form	Day Supply	Last Order Date	Denial Reason	Client ID	Client Name	D.O.B	Reason for Override	Status	Approve/Deny
Sunlenca inj (2-vl)	lenacapavir sodium	463.5/1.5	--	2 vials	--	180	10/03/2024	This medication always requires override.	145413	Sykes, Ladarius	05/25/1990	test	Override Pending	✓ Approve ⊗ Deny

50

Showing rows 1 to 1 of 1

1

Feature Updates: Sprint 21

Pharmacy Package Size Enhancements to Pharmacy Portal Screens Cont.

Package Size Column on Shipment Resubmission Overrides Screen

Order Resubmission Override Request



Pharmacy ID	Trade Name	Generic Name	Dosage Strength	Measure	Package Size	Form	Day Supply	Quantity	Original Order Id	Last Order Date	Client ID	Client Name	D.O.B	Resubmit Reason	Status	Approve/Deny	Select
45	Dovato (30/btl)	dolutegravir/lamivudine	5	MG/MG	30	TAB	90	1	54702	08/23/2024	103115	Solis, Carlos	03/15/1978	sadssadad	Approved	✓ Approve ⊗ Deny	☐ Select
45	AMLODIPINE (90/btl)	amlodipine	50:300	MG	90	TAB	30	1	54702	08/23/2024	103115	Solis, Carlos	03/15/1978	sadssadad	Approved	✓ Approve ⊗ Deny	☐ Select
730	Dovato-90Day	dolutegravir/lamivudine	50:300	MG/MG	30	TAB	90	3	50685	05/16/2024	133038	Garcia, Perfecto	07/15/1961	Not received in B#50685 with other medications.	Approved	✓ Approve ⊗ Deny	☐ Select
106	TIVICAY (30/btl)	dolutegravir sodium	50	MG	30	TAB	30	1	54646	08/23/2024	135008	Williams, Alex	01/17/1973	hdhffyyujdgsg	--	✓ Approve ⊗ Deny	☐ Select
106	DESCOVY (30/btl)	emtricitabine/tenofovir alafenamide	200:25	MG/MG	30	TAB	30	1	54646	08/23/2024	135008	Williams, Alex	01/17/1973	hdhffyyujdgsg	--	✓ Approve ⊗ Deny	☐ Select
730	Dovato-90Day	dolutegravir/lamivudine	50:300	MG/MG	30	TAB	90	3	50685	05/16/2024	141216	Scruggs, Terry	09/20/1981	Not received in B#50685 with other medications.	Approved	✓ Approve ⊗ Deny	☐ Select
749	Dovato (30/btl)	dolutegravir/lamivudine	50:300	MG/MG	30	TAB	30	1	50239	05/16/2024	180343	Galindo, Gamaniel	12/21/1985	Batch 50239 not received by pharmacy; FedEx shows delivered with tracking number 776295927434.	Approved	✓ Approve ⊗ Deny	☐ Select
63	BIKTARVY (30/btl)	bictegravir/emtricitabine/tenofovir ala	50:200:25	MG/MG/MG	30	TAB	30	1	54647	08/23/2024	401603	Machado, Norma	12/04/1963	resubmitting testing please work	--	✓ Approve ⊗ Deny	☐ Select
143	JULUCA (30/btl)	DOLUTEGRAVIR/RILPIVIRINE	50:25	MG/MG	30	TAB	30	1	51480	06/03/2024	409747	Del Angel, Patricia	06/11/1968	Not received in original batch #51480	--	✓ Approve ⊗ Deny	☐ Select
782	BIKTARVY (30/btl)	bictegravir/emtricitabine/tenofovir ala	50:200:25	MG/MG/MG	30	TAB	30	1	50393	05/20/2024	417881	Quinn, Tywanda	04/03/1976	Batch #50393 delayed by FedEx - not delivered.	--	✓ Approve ⊗ Deny	☐ Select
730	Dovato-90Day	dolutegravir/lamivudine	50:300	MG/MG	30	TAB	90	3	50685	05/16/2024	419299	DeLeon Erazo, Henry	05/29/1984	Not received in B#50685 with other medications.	Approved	✓ Approve ⊗ Deny	☐ Select
782	BIKTARVY (30/btl)	bictegravir/emtricitabine/tenofovir ala	50:200:25	MG/MG/MG	30	TAB	30	1	50393	05/20/2024	420475	benford, jaelyn	08/31/1998	Batch #50393 delayed by FedEx - not delivered.	--	✓ Approve ⊗ Deny	☐ Select

Feature Updates: Sprint 21

Agency Portal Client Pages Preventing Duplicate Values for Primary and Secondary Languages

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 System will now flag if a User indicates the same language in both the 'What is Your Primary Language?' and 'What is Your Secondary Language?' single-select drop downs in an Application Workflow/Client's Profile.
- If the User indicates the same language value (*English, Spanish, or Other*) for both the Primary and Secondary Languages and clicks on the 'Continue' button, the following validation message will display on the top banner of the screen:
 - "Please enter a language that is not identical to the primary/secondary language."

Primary & Secondary Language Section on Application Workflow/Client's Profile

Race, Ethnicity, and Language

Race (Select All that Apply) *

Select

Are you Hispanic?

No Yes

What is Your Primary Language?

English

What is your Secondary Language?

English

Error Validation Message When Primary & Secondary Language Values are Repeated

Please enter a language that is not identical to the primary/secondary language.

Basic Information

✓ Personal Information

✓ Contact Information

Back Save & Exit Continue

Feature Updates: Sprint 21

Agency Portal Client Pages Preventing Duplicate Values for Primary and Secondary Languages Cont.

- If a User indicates the same value for the 'Please Specify the Language' conditional, free text fields that display when the 'Other' value is selected for both the Primary and Secondary Language questions, the same validation message will appear on the top banner of the About Me/About You screens:
 - "Please enter a language that is not identical to the primary/secondary language."
- This enhancement is applicable across all Application Types (*New Application, Recertification, Self-Attestation, Change Request, and Referral*).
- The Client's saved language(s) will display on the Application Review Summary screen of an Application Workflow, and the Application History screen's Accessible View and Download PDF actions of a Client's Profile.
- This enhancement is applicable to both the Application Workflow and Client's Profile in both the Agency and Client Portals.

Other - 'Please Specify the Language' Scenario

The screenshot displays a form titled "Race, Ethnicity, and Language". It includes a "Race" field with a dropdown menu showing "White". Below this is a question "Are you Hispanic?" with "No" and "Yes" buttons. The "What is Your Primary Language?" field has a dropdown menu with "Other" selected. The "What is your Secondary Language?" field also has a dropdown menu with "Other" selected. To the right of these fields, a yellow box highlights the "Please Specify the Language" input fields, which both contain the text "Hebrew".