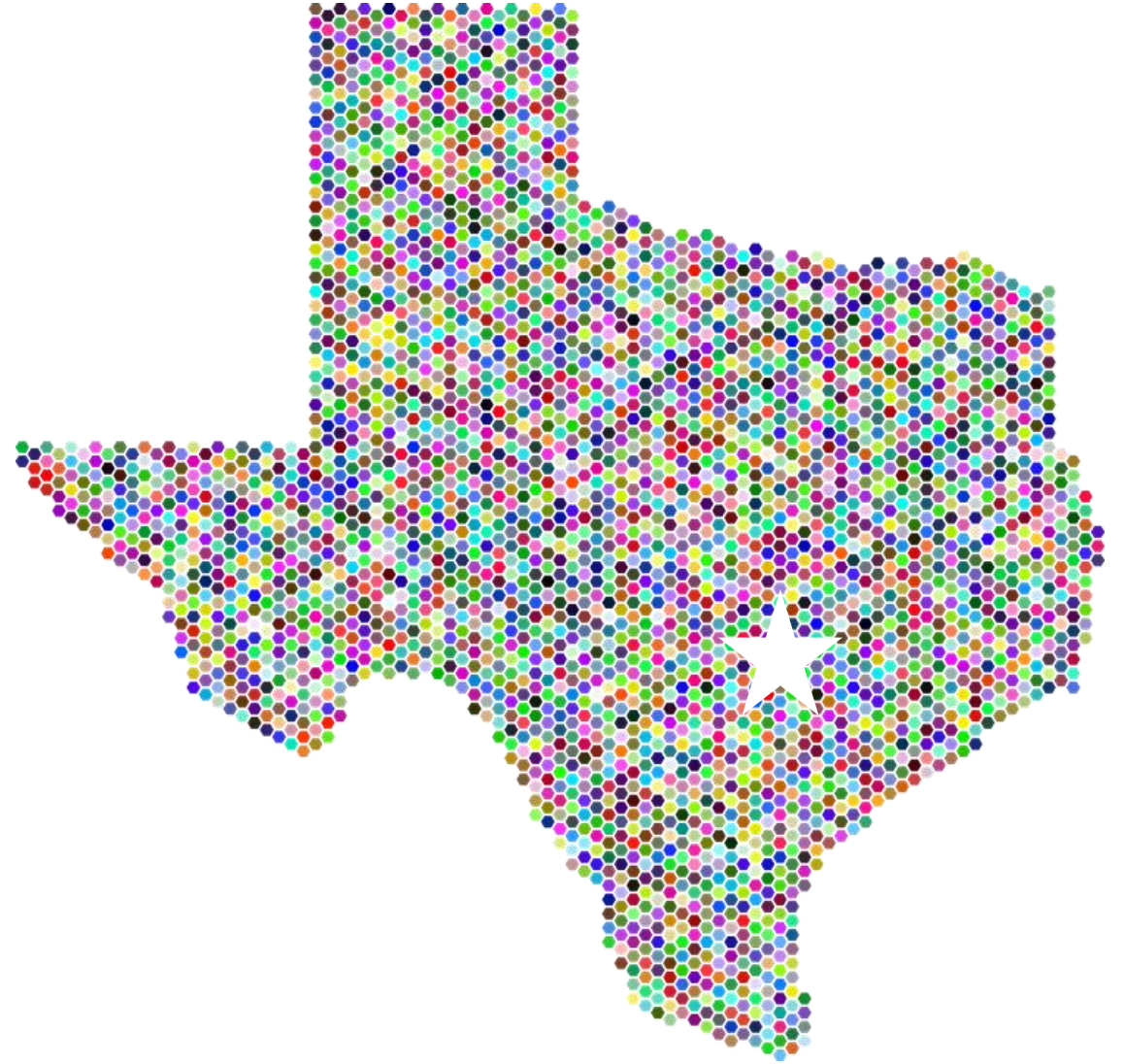


Take Charge Texas (TCT) User Engagement Session

December 19th, 2024



Meet the Facilitators

DSHS/HHSC TEAM



Charletha Joseph
Program Support



Rachel Sanor
HIV Care and
Medications Unit
Director



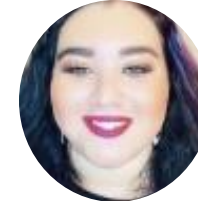
Christine Salinas
ADAP Regional
Manager



Janina Vazquez
HIV Care Services
Group Manager



Holly Benavides
TCT Help Desk Program
Specialist



Ethel Garcia
Medication Data and Analysis
Group Manager

DELOITTE TEAM



Nikki Fernandes
Project Manager



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Team Lead/Scrum Master



Meeta Sharma
Test Lead



Alex Davis
Consultant/Discovery

Agenda

- 1 Introduction & Overview of Objectives
- 2 TCT Roadmap of Deployed Enhancement Features
- 3 TCT In Progress Enhancement Features
- 4 System Overview: New TCT Enhancement Features
- 5 Gathering Your Feedback
- 6 Close Out & Next Steps

How to Ask Questions:

All lines are muted.

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

Poll Everywhere

Poll Everywhere

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

If you are a **DSHS Staff member**, please use this link:
[**PollEV.com/tctdshsstaff**](https://PollEV.com/tctdshsstaff)

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

What do you hope to learn through this session? Select all that apply.



Today's Objectives

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



TCT Roadmap of Deployed Enhancement Features



Project Plan: Successfully Completed Features

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



SPRINT 1

Focused on RSR submission in TCT System, supporting multiple agencies as they submitted the annual report, in addition to establishing a new client creation process.



SPRINT 2

Focused on establishing the framework to initiate an automated client merge process, in addition to features for task board which provided a seamless workflow for TCT users.



SPRINT 3

Focused on establishing an automated client merge process which reduced the lengthy manual client merge process, updating Share Status capabilities, and enabling the privatization of Case Notes



SPRINT 4

Focused on the creation of a drug regimen override process as well as other Pharmacy Portal enhancements, and the introduction of Standard Deduction process for determining THMP Eligibility

User Stories

Sprint 1

- Client Import into TCT & New Client Creation
- TCT Client Import – Successful Creation
- TCT Client Import – Failed Creation
- Adding EUCI Code as a Search Parameter
- Updating 'Sex at Birth' to an Editable Field

Sprint 2

- Identification of Potential Duplicates
- Client Merge Automation Rules
- UI Screen: Duplicate Client Report
- Inactivating 'Apply Now' for Linked Clients
- Updating Filters to Multi-Select Values
- Addition of THMP Subprograms
- Addition of Date Submitted Filters

Sprint 3

- Client Merge Report
- Exception Messages for Failed Merges
- Client Merge Automation Rules
- Split CARE & THMP Services in 'My Needs'
- Adding New Case Note Categories
- Allowing for Private Case Notes
- Updating Share Status in Agency Portal
- Updating Task Board Permissions
- Edit THMP Subprograms

Sprint 4

- Manage Approvals & Denials Of Client Regimen Overrides
- Add Pharmacy Information To Shipping Details
- Order Override Request
- Day Supply Limitations On Add Prescribed Drug & Worker Portal Order Screens
- Client Merge Report Agency Filter
- Drug Approval & Regimen Drop Date Details
- Submitting Client Regimen Overrides
- Separate Spouse/Partner/Common Law Relationship Options
- Standard Deduction Reference Table Management
- Standard Deduction – THMP Adjusted Household FPL

Project Plan: Successfully Completed Features

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



SPRINT 5

Focused on the establishment of pharmacy site creation as well as pharmacy order creations. Provided additional features in maintaining client status activities



SPRINT 6

Focused on creating Pharmacy reports as well as notification letters for Pharmacy related updates on Client profiles. Provides additional immunization report capabilities.



SPRINT 7

Focused on the application workflow enhancements as well as client merge/linking history. Provided improvements to Task Board for processing applications effectively.



SPRINT 8

Focused on enhancements of Agency Portal Client Pages and updates to Client Merge process. Provided enhancements to Eligibility and Client Import process.

User Stories

Sprint 5

- Creation of Secondary Sites
- Assigning Secondary Sites to Clients
- Display Additional Client Results on Order Dashboard
- Open Order Enhancements
- Agency Assigned ID Numbers (AIDN)
- Prevent Updates to THMP Subprograms on Task Board from Updating Application History
- Addition of Emergency Screening Questionnaire Page to All Applications
- Update Permissions for Inactivating Clients
- Allow Access to Profiles of Inactive Clients

Sprint 6

- Shingrix Vaccine Enhancements
- Exclude ADAP Clients on Hold From the Clients Coming Up For Renewal Report
- Update Client Letter Templates
- Monthly Pharmacy Orders Report
- Generating Letters by Client ID
- Update Letter Triggering Conditions
- Client/Pharmacy Update Letter Pharmacy Copy
- Client Order Count by Medication Report

Sprint 7

- Update Hyperlink in Client Portal
- Expand Provider Agencies for Selection on Application Workflow
- Combine Household Details Questions on Clients' Relationship Pages
- Display Only Active Provider Agencies on Agency Selection Screen & Task Board
- Display Master Client ID in Edit Client Profile & Merge/Linking History
- Update MpoX Language in TCT
- Pharmacy Cover Letter Updates
- Task Board – Displaying Reason for Emergency Application
- Performing Bulk Edits on the Task Board: THMP Owner & CARE Owner
- Remove THMP Region from User Scope Assignment

Sprint 8

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

Project Plan: Successfully Completed Features

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



SPRINT 9

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



SPRINT 10

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



SPRINT 11

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



SPRINT 12

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

User Stories

Sprint 9

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

Sprint 10

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

Sprint 11

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

Sprint 12

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

Project Plan: Successfully Completed Features

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



SPRINT 13

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



SPRINT 14

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



SPRINT 15

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



SPRINT 16

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

User Stories

Sprint 13

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

Sprint 14

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

Sprint 15

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

Sprint 16

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

Project Plan: Successfully Completed Features

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



SPRINT 17

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



SPRINT 18

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



SPRINT 19

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



SPRINT 20

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

User Stories

Sprint 17

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

Sprint 18

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

Sprint 19

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

Sprint 20

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

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 be 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.



SPRINT 22

Introduced the Scheduled Client Medication Unordered Report to identify clients who have not submitted a medication order in the last 6 months. Enhanced the Transfer Report screen and results table to include additional search criteria and data elements. Updated Task Board records to display only CARE transactional data when a User submits a referral application requesting additional CARE services. Enhanced the Order Overrides and Shipment Resubmission Overrides screens to detect removed and/or deactivated pharmacies. Updated the Contact Preferences functionality to remove pre-selected values in both the Application Workflow and Client's Profile and introduced Facility Information as part of the Emergency Screening page in the Application Workflow. Incorporated the Substance Use and Mental Health screening test results as part of the STAR Report and View STAR Reports screens.

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

Sprint 22

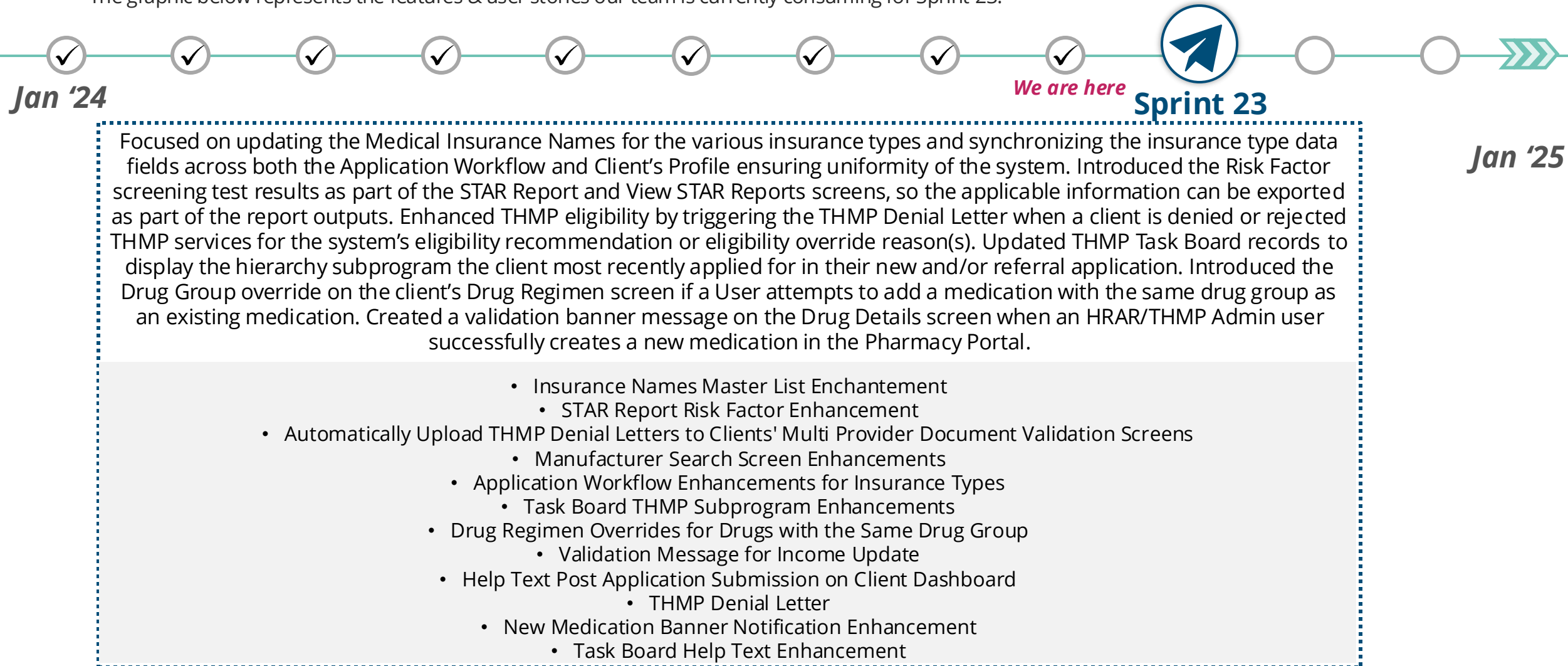
- Separation of Private Employer and Veteran Affairs Insurances
- Add UOS Unit to the Universal Service Utilization Report
- Restrict Task Board THMP Tasks for Self-Referral CARE Applications
- Order Overrides and Shipment Resubmission Overrides Screen Enhancements
- Adding Drug Code Column to Pharmacy Portal Screens
- My Relationships, Client Financial Information and Countable Income Screen Enhancements
- Facility Information Enhancements
- Transfer Report Screen Enhancements
- STI/HEP Test Result Enhancements
- Scheduled Client Medication Unordered Report
- Contact Preference Enhancements
- STAR Report Screening Enhancements
- Multi-Provider Document Verification Tooltip for Insurance
- Client Merge Request
- Pharmacy Search Screen Enhancement

TCT In Progress Enhancement Features



Project Plan: In Progress Features

The graphic below represents the features & user stories our team is currently consuming for Sprint 23.



System Overview: **New** TCT Features



Live Demonstration of TCT Features

TCT Features Video Presentation

- [Separation of Private Employer and Veteran Affairs Insurances](#)
- [Add UOS Unit to the Universal Service Utilization Report](#)
- [Restrict Task Board THMP Tasks for Self-Referral CARE Applications](#)
- [Order Overrides and Shipment Resubmission Overrides Screen Enhancements](#)
- [Adding Drug Code Column to Pharmacy Portal Screens](#)
- [My Relationships, Client Financial Information and Countable Income Screen Enhancements](#)
- [Facility Information Enhancements](#)
- [Transfer Report Screen Enhancements](#)
- [STI/HEP Test Result Enhancements](#)
- [Scheduled Client Medication Unordered Report](#)
- [Contact Preference Enhancements](#)
- [STAR Report Screening Enhancements](#)
- [Multi-Provider Document Verification Tooltip for Insurance](#)
- [Client Merge Request](#)
- [Pharmacy Search Screen Enhancement](#)



Poll Everywhere

Poll Everywhere

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

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

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

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



Gathering Your Feedback



Poll Everywhere

Poll Everywhere

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

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

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

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



How to Provide Feedback to TCT?

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

Our team always welcomes your feedback!

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

Reasons to Provide Feedback

☐

TCT System will include enhancements that cater to your responsibilities!

☐

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

Next Steps



Upcoming Activities

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



Charletha Joseph

Charletha.Joseph@dshs.texas.gov



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

Thank You!

System Overview: **New** TCT Features



Feature Updates: Sprint 22

Pharmacy Order Overrides and Shipment Resubmission Overrides Screen Enhancements

When a TCT User navigates to the Order Overrides screen, the following enhancements will occur:

- The System will now flag Client records whose pharmacy has been removed from the Client's Profile.
 - If a User clicks on the 'Approve' action button for a record falling under this condition, the following validation message will display on screen:
 - "[Pharmacy ID] is removed from the Client's Profile as of [MM/DD/YYYY]. As the pharmacy is removed, the medication order cannot be submitted. Please update the pharmacy assignment for the Client."
 - *The [Pharmacy ID] value will be sourced from the 'Pharmacy Code' field on the Pharmacy Details screen.*
 - *The [MM/DD/YYYY] value will be sourced from the 'Pharmacy Removed On' column, for the latest pharmacy assignment, on the Primary and/or Secondary Pharmacy Update History pop up(s).*
 - The validation message pop up will only include a 'Cancel' button as no submittal action can be taken by the User due to the pharmacy having been removed from the Client's Profile.
 - Existing Approve/Deny validation message(s) will continue to remain intact for non-removed pharmacies.

Order Overrides Removed Pharmacy Validation Message

Pharmacy 67 is removed from the Client's Profile as of 10/23/2024. As the pharmacy is removed, the medication order cannot be submitted. Please update the pharmacy assignment for the Client.

Cancel

Feature Updates: Sprint 22

Pharmacy Order Overrides and Shipment Resubmission Overrides Screen Enhancements Cont.

When a TCT User navigates to the Shipment Resubmission Overrides screen, the following enhancements will occur:

- The System will now flag Client records whose pharmacy has been removed from the Client's Profile.
 - If a User clicks on the 'Approve' action button for a record falling under this condition, the following validation message will display on screen:
 - "[Pharmacy ID] is removed from the Client's Profile as of [MM/DD/YYYY]. As the pharmacy is removed, the medication order cannot be submitted. Please update the pharmacy assignment for the Client."
 - *The [Pharmacy ID] value will be sourced from the 'Pharmacy Code' field on the Pharmacy Details screen.*
 - *The [MM/DD/YYYY] value will be sourced from the 'Pharmacy Removed On' column, for the latest pharmacy assignment, on the Primary and/or Secondary Pharmacy Update History pop up(s).*
 - The validation message pop up will only include a 'Cancel' button as no submittal action can be taken by the User due to the pharmacy having been removed from the Client's Profile.
 - Existing Approve/Deny validation message(s) will continue to remain intact for non-removed pharmacies.

Shipment Resubmission Overrides Removed Pharmacy Validation Message

Pharmacy 67 is removed from the Client's Profile as of 10/23/2024. As the pharmacy is removed, the medication order cannot be submitted. Please update the pharmacy assignment for the Client.

Cancel

Feature Updates: Sprint 22

Pharmacy Order Overrides and Shipment Resubmission Overrides Screen Enhancements Cont.

When a TCT User navigates to the Shipment Resubmission Overrides screen, the following enhancements will occur:

- The System will now flag Client records whose pharmacy has been deactivated/dropped.
 - If a User clicks on the 'Approve' action button for a record falling under this condition, the following validation message will display on screen:
 - "[Pharmacy ID] is deactivated as of [MM/DD/YYYY]. As the pharmacy is deactivated, the medication order cannot be submitted. Please update the pharmacy assignment for the Client."
 - *The [Pharmacy ID] value will be sourced from the 'Pharmacy Code' field on the Pharmacy Details screen.*
 - *The [MM/DD/YYYY] date value will be sourced from the 'Dropped Date' field on the Pharmacy Details screen.*
 - *No deactivation validation message will display if the pharmacy's Dropped Date is in the future and has not yet been reached as of the current date (today's date) and is considered to be Active.*
 - The validation message pop up will only include a 'Cancel' button as no submittal action can be taken by the User due to the pharmacy having been deactivated/dropped.
 - Existing Approve/Deny validation message(s) will continue to remain intact for non-deactivated pharmacies.

Shipment Resubmission Overrides Deactivated Pharmacy Validation Message

Pharmacy 45 is deactivated as of 10/23/2024. As the pharmacy is deactivated, the medication order cannot be submitted. Please update the pharmacy assignment for the Client.

Cancel

Feature Updates: Sprint 22

Pharmacy Adding Drug Code Columns to Pharmacy Portal Screens

When a TCT User navigates to the Pharmacy Portal, the following enhancements will occur:

- A new column, titled '**Drug Code**', will be added to the left of the existing 'Trade Name' column on the following screens:
 - Drug Regimen
 - Client Medicine Order History
 - Worker Portal Order
 - Order Details
 - Order Transfer
 - Review Order
 - Order Conflicts
 - Order Overrides
 - Client Regimen Overrides
 - Shipment Resubmission Overrides
- The associated Drug Code value(s) will be sourced from the 'Drug Code' field(s) on the respective Drug Details screen(s).

Feature Updates: Sprint 22

Pharmacy Adding Drug Code Columns to Pharmacy Portal Screens Cont.

'Drug Code' Field on Drug Details Screen

Drug Details

Trade Name *	Generic Name *	Abbr
DAPSONE	Dapsone	DAPSONE
Drug Class	Drug Group	Drug Code
PCP x v	DAPSN	28
Dosage Strength *	Form *	Measure
100	TAB x v	MG x v
ARV? *	Count As *	NDC Code *
No d	0	49938010101
Pkg Size *	Package *	Cost
100	BOT x v	\$ 16.56
Min Day Supply *	Max Per Month *	Medicaid Clients Eligible
30	1	Yes d
Status	Approval Date	Drop Date
Dropped d	06/27/1994	11/05/2008
Drug Requires Override? *	Contains Abacavir?	Added as a booster?
No d	No d	No d
Priority	Notes	☐ Hold?
1		

Feature Updates: Sprint 22

Pharmacy Adding Drug Code Columns to Pharmacy Portal Screens Cont.

Drug Code Column on Drug Regimen Screen

Prescribed Drugs

TX MD/DO License # *

Doctor Name:

Search Doctor

Add Prescription

Status

Active

CSV

XLS

PDF

Print

Pharmacy Site Type	Pharmacy Name	Drug Code	Trade Name	Generic Name	Dosage Strength	Measure	Package Size	Form	Count As	Day Supply	Dosage Frequency	TX MD/DO License #	New Drug to Client?	Status	Approval Date	Regimen Drop Date	Drop?
--	--	54	FLUCONAZOLE (30/btl)	Fluconazole	200	MG	30	TAB COATED	0	30		CONV0002		Approved	10/29/2024	--	Drop

50

Showing rows 1 to 1 of 1

1

Prescription Notes

Add a Note

Select Note Category

Select

Note

Feature Updates: Sprint 22

Pharmacy Adding Drug Code Columns to Pharmacy Portal Screens Cont.

Drug Code Column on Client Medicine Order History Screen

Client Medicine Order History

CSV

X

W

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

50

Showing rows 0 to 0 of 0

Feature Updates: Sprint 22

Pharmacy Adding Drug Code Columns to Pharmacy Portal Screens Cont.

Drug Code 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

Pharmacy Name ⓘ

Client Status ⓘ

Active

THMP Eligibility Status ⓘ

Approved

THMP Subprogram ⓘ

ADAP

Search

Clear Search

Pharmacy ID

Client ID

Client Name

D.O.B

Drug Code

Trade Name

Generic Name

Dosage Strength

Measure

Package Size

Form

Day Supply

Quantity

Last Order Date

Medicaid/CHIP ID

Min Day Supply

Select

There are no order line items for this order!

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Feature Updates: Sprint 22

Pharmacy Adding Drug Code Columns to Pharmacy Portal Screens Cont.

Drug Code 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

Not Received

Order Received Status Date

MM/DD/YYYY

Download

Excel

Print

PDF

Pharmacy ID	Drug Code	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
905	123	VALTREX	valacyclovir	1	GM	30	CAP	32	1			Dispensed Date MM/DE	Medication Shipment Received Not Received	Medication Received Date MM/DD	106225	imy, papa	07/31/1991	Approved		☐

50

Showing rows 1 to 1 of 1

Save

Resubmit Order

Transfer

Feature Updates: Sprint 22

Pharmacy Adding Drug Code Columns to Pharmacy Portal Screens Cont.

Drug Code Column on Order Transfer Screen

Order Transfer Screen

CSVXLSWordPDF

Pharmacy ID	Drug Code	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
905	123	VALTREX	valacyclovir	1	GM	30	CAP	32	1	Quantity to be Transferred		106225	imy, papa	Search		07/31/1991

50

Showing rows 1 to 1 of 1

Back

Confirm Transfer

Feature Updates: Sprint 22

Pharmacy Adding Drug Code Columns to Pharmacy Portal Screens Cont.

Drug Code 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

CSV

XLS

PDF

DOC

Pharmacy ID	Site Usage Designation	Drug Code	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?
There are no order line items for this order!																

50Showing rows 0 to 0 of 0

< 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).

CSV

XLS

PDF

DOC

Pharmacy ID	Reason for Non-Submission	Site Usage Designation	Drug Code	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

Feature Updates: Sprint 22

Pharmacy Adding Drug Code Columns to Pharmacy Portal Screens Cont.

Drug Code 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	Drug Code	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
856	284	TRIUMEQ-90Day	Triumeq-90Day (abacavir/3TC/dolutegravir	600:50:300	MG	30	TAB	90	1	10/08/2024	Too early for a refill	109549	Butts, Christopher	12/09/1971	Reason for Override *	Remove
856	301	BIKTARVY-90-Day	bictegravir/emtricitabine/tenofovir ala	50:200:25	MG:MG:MG	30	TAB	90	1	11/01/2024	Too early for a refill	408508	Jacobo, Oscar	06/22/1985	Reason for Override *	Remove

Feature Updates: Sprint 22

Pharmacy Adding Drug Code Columns to Pharmacy Portal Screens Cont.

Drug Code Column on Order Overrides Screen

Order Overrides

Pharmacy ID	Pharmacy Dropped Date	Drug Code	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
4	04/09/2025	119	DAPSONE	Dapsone	25	MG	30	TAB	30	1	07/09/2024	Too early for a refill	104187	test_johnsaa	07/31/1991		Approved	✓ Approve ⊗ Deny	☐ Select
4	04/09/2025	109	KALETRA	Lopinavir/Ritonavir	200:50	MG	120	TAB	30	1	09/16/2024	Too early for a refill	104187	test_johnsaa	07/31/1991		Approved	✓ Approve ⊗ Deny	☐ Select
4	04/09/2025	109	KALETRA	Lopinavir/Ritonavir	200:50	MG	120	TAB	30	1	09/16/2024	Too early for a refill	104187	test_johnsaa	07/31/1991		Approved	✓ Approve ⊗ Deny	☐ Select
4	04/09/2025	119	DAPSONE	Dapsone	25	MG	30	TAB	30	1	07/09/2024	Too early for a refill	104187	test_johnsaa	07/31/1991	TESTERGH	Approved	✓ Approve ⊗ Deny	☐ Select
4	04/09/2025	109	KALETRA	Lopinavir/Ritonavir	200:50	MG	120	TAB	30	1	09/16/2024	Too early for a refill	104187	test_johnsaa	07/31/1991	FGFGHGH	Approved	✓ Approve ⊗ Deny	☐ Select
4	04/09/2025	111	ATRIPLA	Atripla	600:200:300	MG/MG/MG	30	TAB	30	1	08/15/2024	Too early for a refill	104187	test_johnsaa	07/31/1991	GHIHIJH	Approved	✓ Approve ⊗ Deny	☐ Select
4	04/09/2025	109	KALETRA	Lopinavir/Ritonavir	200:50	MG	120	TAB	30	1	09/16/2024	Too early for a refill	104187	test_johnsaa	07/31/1991	fgfgggh	Approved	✓ Approve ⊗ Deny	☐ Select
4	04/09/2025	109	KALETRA	Lopinavir/Ritonavir	200:50	MG	120	TAB	30	1	09/16/2024	Too early for a refill	104187	test_johnsaa	07/31/1991	fffff	Approved	✓ Approve ⊗ Deny	☐ Select
4	04/09/2025	109	KALETRA	Lopinavir/Ritonavir	200:50	MG	120	TAB	30	1	09/16/2024	Too early for a refill	104187	test_johnsaa	07/31/1991	sdfdsfd	Approved	✓ Approve ⊗ Deny	☐ Select
4	04/09/2025	109	KALETRA	Lopinavir/Ritonavir	200:50	MG	120	TAB	30	1	09/16/2024	Too early for a refill	104187	test_johnsaa	07/31/1991	cvzdc	Approved	✓ Approve ⊗ Deny	☐ Select
4	04/09/2025	109	KALETRA	Lopinavir/Ritonavir	200:50	MG	120	TAB	30	1	09/16/2024	Too early for a refill	104187	test_johnsaa	07/31/1991	test	Approved	✓ Approve ⊗ Deny	☐ Select
67	08/11/2021	394	pimstest	pimstest	30	%	1	AER	45	1	06/25/2024	Day Supply has been changed from original amount in the client record	104497	anjaliTestAutomatic, Sunita	02/01/2000	test	Approved	✓ Approve ⊗ Deny	☐ Select
229	--	229	BIKTARVY	bictegravir/emtricitabine/tenofovir ala	50:200:25	MG/MG/MG	30	TAB	30	1	10/10/2024	Too early for a refill	105332	CartwrightABC, DamonABC	05/04/1990	ghghgh	--	✓ Approve ⊗ Deny	☐ Select
229	--	229	BIKTARVY	bictegravir/emtricitabine/tenofovir ala	50:200:25	MG/MG/MG	30	TAB	30	1	10/10/2024	Too early for a refill	105332	CartwrightABC, DamonABC	05/04/1990	efdwefd	--	✓ Approve ⊗ Deny	☐ Select
946	--	1	ZIDOVUDINE	Zidovudine (AZT)	10	MG	100	AER	30	1	10/10/2024	Strength does not match drug regimen Day Supply has been changed from original	105494	dcdvdc, dcdvdcfyc	07/31/2023	431234	--	✓ Approve	☐ Select

Feature Updates: Sprint 22

Pharmacy Adding Drug Code Columns to Pharmacy Portal Screens Cont.

Drug Code Column on Client Regimen Overrides Screen

Client Regimen Overrides

Drug Code

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

There are no requested overrides!

50 -

Showing rows 0 to 0 of 0

Feature Updates: Sprint 22

Pharmacy Adding Drug Code Columns to Pharmacy Portal Screens Cont.

Drug Code Column on Shipment Resubmission Overrides Screen

Order Resubmission Override Request

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Pharmacy ID	Drug Code	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
945	2	ZIDOVUDINE OS	Zidovudine OS (AZT)	10	MG/ML	260 ML	SYRUP	30	1	3429	10/07/2024	106214	TestOrderOverride, Sunita	09/08/1991	testing	--	✓ Approve ⛔ Deny	☐ Select
905	123	VALTREX	valacyclovir	1	GM	30	CAP	32	1	3434	10/10/2024	106225	imy, papa	07/31/1991	test	Approved	✓ Approve ⛔ Deny	☐ Select

50 - Showing rows 1 to 2 of 2

➕ Submit Order

Feature Updates: Sprint 22

Insurance Verification Separation of Private Employer and Veteran Affairs Insurances

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

- The existing 'Private/employer insurance or Veteran's Affairs (VA) insurance' insurance type will be separated out into the following, individual insurance types:
 - Private/Employer Insurance
 - *The following Spanish translation will exist in the Client Portal:*
 - *Seguro de Salud Privado/Seguro de Salud Provisto por el Empleador*
 - Veteran's Affairs (VA), Tricare or Other Military Health Plan
 - *The following Spanish translation will exist in the Client Portal:*
 - *Asuntos de Veteranos (VA por sus siglas en ingles), Tricare u otro plan de salud militar*
- The corresponding header(s) that display when the insurance type(s) is selected will be updated to reflect the new language:
 - Private/Employer Insurance
 - Veteran's Affairs (VA), Tricare or Other Military Health Plan
- The updated insurance type value(s) will also reflect on the Insurance History screen.
- This enhancement is applicable to both the Application Workflow and Client's Profile in both the Agency and Client Portals.

Feature Updates: Sprint 22

Insurance Verification Separation of Private Employer and Veteran Affairs Insurances Cont.

Updated Insurance Type(s) on My Insurance Screen

My Insurance

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

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

Select

Medicare Part D

Other comprehensive healthcare plans

Patient assistance programs (PAPs)

Private/employer insurance

Veteran's Affairs (VA), Tricare or Other Military Health Plan

Updated Insurance Type(s) on Insurance Information Screen

Insurance Information

Insurance Details

Select

Medicare Part D

Other comprehensive healthcare plans

Patient assistance programs (PAPs)

Private/employer insurance

Veteran's Affairs (VA), Tricare or Other Military Health Plan

Feature Updates: Sprint 22

Insurance Verification Separation of Private Employer and Veteran Affairs Insurances Cont.

Private/Employer Updated Insurance Type on My Insurance Screen

My Insurance

Insurance Details

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

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

Private/employer insurance ×

Private/employer insurance

Start Date

MM/DD/YYYY

End Date

MM/DD/YYYY

Insurance Name

Select

Member ID Number

Insurance Plan Phone Number

(###) ###-####

Back

Save & Exit

Continue

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Feature Updates: Sprint 22

Insurance Verification Separation of Private Employer and Veteran Affairs Insurances Cont.

Veteran's Affairs Updated Insurance Type on My Insurance Screen

My Insurance

Insurance Details

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

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

Veteran's Affairs (VA), Tricare or Other Military Health Plan ×

Veteran's Affairs (VA), Tricare or Other Military Health Plan

Start Date

MM/DD/YYYY

End Date

MM/DD/YYYY

Insurance Name

Select

Member ID Number

Insurance Plan Phone Number

(###) ###-####

Back

Save & Exit

Continue

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Feature Updates: Sprint 22

Insurance Verification Separation of Private Employer and Veteran Affairs Insurances Cont.

Private/Employer Updated Insurance Type on Insurance Information Screen

Insurance Information

Insurance Details

Private/employer insurance x

Private/employer insurance

Start Date

MM/DD/YYYY

Medical Insurance Name

Select

Prescription Drug Plan Name

Policy holder's first name (if other than client)

Policy holder date of birth (if other than client)

MM/DD/YYYY

Group Number

RX Bin Number

Relationship of Policy Holder to client

Aunt

You must upload a copy of your insurance cards (front and back) on the document upload screen or the application will be pending.

Ramsey ID

End Date

MM/DD/YYYY

Plan ID

Individual Policy Number

Policy holder last name (if other than client)

Insurance Phone Number

(888) 888-8888

RX PCN

Save Changes

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Feature Updates: Sprint 22

Insurance Verification Separation of Private Employer and Veteran Affairs Insurances Cont.

Veteran's Affairs Updated Insurance Type on Insurance Information Screen

Insurance Information

Insurance Details

Veteran's Affairs (VA), Tricare or Other Military Health Plan

Veteran's Affairs (VA) Insurance

Start Date

MM/DD/YYYY

Medical Insurance Name

Select

Prescription Drug Plan Name

Policy holder's first name (if other than client)

Policy holder date of birth (if other than client)

MM/DD/YYYY

Group Number

XX Eln Number

Relationship of Policy Holder to client

Aunt

You must upload a copy of your insurance cards (front and back) on the document upload screen or the application will be pending.

Ramsell ID

End Date

MM/DD/YYYY

Plan ID

Individual Policy Number

Policy holder last name (if other than client)

Insurance Phone Number

(000) 000-0000

XX PCN

Save Changes

Feature Updates: Sprint 22

Insurance Verification Separation of Private Employer and Veteran Affairs Insurances Cont.

Private/Employer and/or Veteran's Affairs Insurance Type(s) on Insurance History Screen

Insurance History

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

Current Insurance Details

CSVXWPDF

Updated By	Start Date	End Date	Insurance Type	Actions
testthradmin			Private/employer insurance	History
testthradmin			Veteran's Affairs (VA), Tricare or Other Military Health Plan	History

Previous Insurance History

CSVXWPDF

Updated By	Insurance Removed Date	Start Date	End Date	Insurance Type	Actions
testthradmin	10/23/2024			COBRA	History

Feature Updates: Sprint 22

Insurance Verification Separation of Private Employer and Veteran Affairs Insurances Cont.

Private/Employer Updated Spanish Translation (Applicable to Client Portal Only)

Mi seguro

Actualizar Mi seguro
Usted está inscrito en los servicios que se indican a continuación. Revise y certifique su información en las siguientes páginas para asegurarse de que es correcta y pueda seguir recibiendo los beneficios. No puede añadir o eliminar programas en este momento.

Detalles del seguro
Información sobre sus beneficios de salud. Los campos marcados con * son requeridos.

¿Recibe alguno de los siguientes beneficios del seguro? (Seleccione todas las que correspondan)

Select

No sé

Otros planes médicos integrales

Plan de salud para indigentes del condado

Programas de asistencia al paciente (PAP)

Seguro de Salud Privado/Seguro de Salud Provisto por el Empleador

Panel de Cuenta

Continúe

Veteran's Affairs Updated Spanish Translation (Applicable to Client Portal Only)

Mi seguro

Actualizar Mi seguro
Usted está inscrito en los servicios que se indican a continuación. Revise y certifique su información en las siguientes páginas para asegurarse de que es correcta y pueda seguir recibiendo los beneficios. No puede añadir o eliminar programas en este momento.

Detalles del seguro
Información sobre sus beneficios de salud. Los campos marcados con * son requeridos.

¿Recibe alguno de los siguientes beneficios del seguro? (Seleccione todas las que correspondan)

Select

ACA o planes de mercado

Actualmente no tengo seguro médico o perdí mi seguro desde hace más de 90 días

Asuntos de Veteranos (VA por sus siglas en inglés), Tricare u otro plan de salud militar

CHIP

Panel de Cuenta

Continúe

Feature Updates: Sprint 22

Reports Adding UOS Unit to Universal Service Utilization Report

- When a TCT User navigates to the Universal Service Utilization Report, the following enhancements will occur:
- A new column, titled **'UOS Unit'**, will be added to the right of the existing 'Date of Service' column on the Universal Service Utilization Report outputs, including:
 - CSV
 - PDF
 - Excel
 - The UOS Unit value(s) will be sourced from the 'UOS' column, in the Client Service Details results table, found on the Client Services screen, of a Client's Profile.
 - If a Client has more than one Client Services record saved, the records will appear as separate rows/records in the Universal Service Utilization Report outputs, indicating the same Client ID.
 - *The UOS value(s) is dependent on the Primary, Secondary, and Subservice combinations saved via the Add Client Service Detail Record pop up(s).*
 - The UOS value(s) will be numeric.
 - This enhancement is applicable to the Agency Portal only.

'UOS' Value Saved in Client Service Details Results Table on Client Services Screen

Client Services

Begin Date

MM/DD/YYYY

End Date

MM/DD/YYYY

Staff

Select

Primary Service

Select

Clear Search

Search

Client Service Details

Add Service

Related/Affected Individual	Agency	Primary Service	Secondary Service	SubService	Date	UOS	Total	Actions
---	4801 - Parhandle AIDS Support Organization	Case Management (non-medical)	Case Management (non-medical)		10/28/2024	4	152.00	EditDelete

Feature Updates: Sprint 22

Reports Adding UOS Unit to Universal Service Utilization Report Cont.

UOS Unit Column in Universal Service Utilization Report Output (*Excel*)



TEXAS

Health and Human Services

Texas Department of State Health Services

TakeChargeTexas

Generated On :10/28/2024

Universal Service Utilization Report

Report Date: between

Start Date: 4/3/2024

End Date: 10/28/2024

Other Date:

Agency: 4801 - Panhandle AIDS Support Organization

Funding Source:

Client Id	Date Of Birth	Age	Gender	Race	Ethnicity	Agency	Primary Service	Secondary Service	Subservice Name	Date of Service	UOS Unit	Mode of Transmission	Date of Last Prima
142459	1/8/1968	56	Male	White	Another Hispanic, Latino or Spanish origin, Cuban	4801 - Panhandle AIDS Support	Referral for Health Care/Supportive Services	Referral for Health Care/Supportive Services	referral	5/31/2024	1	Risk factor not reported or not identified,	3/20/2024
142459	1/8/1968	56	Male	White	Another Hispanic, Latino or Spanish origin, Cuban	4801 - Panhandle AIDS Support	Referral for Health Care/Supportive Services	Referral for Health Care/Supportive Services	Referral for health care	6/24/2024	1	Risk factor not reported or not identified,	3/20/2024
142459	1/8/1968	56	Male	White	Another Hispanic, Latino or Spanish origin, Cuban	4801 - Panhandle AIDS Support	Supportive Services	Other Activity	Rx Mail-out Fee	5/9/2024	1	Risk factor not reported or not identified,	3/20/2024
142459	1/8/1968	56	Male	White	Another Hispanic, Latino or Spanish origin, Cuban	4801 - Panhandle AIDS Support	Supportive Services	Other Activity	Rx Mail-out Fee	5/9/2024	1	Risk factor not reported or not identified,	3/20/2024
142782	9/23/1982	42	Male	White		4801 - Panhandle AIDS Support Organization	Referral for Health Care/Supportive Services	Referral for Health Care/Supportive Services	referral	5/20/2024	1	Male to Male sexual contact (MSM),Heterosexual contact, Sex with person who injects	1/26/2024

UniversalServiceUtilizationRepo

Feature Updates: Sprint 22

Reports Adding UOS Unit to Universal Service Utilization Report Cont.

UOS Unit Column in Universal Service Utilization Report Output (PDF)



Texas Department of State Health Services

TakeChargeTexas
Generated On :10/28/2024

Universal Service Utilization Report

Report Date: between

Start Date: 4/3/2024

End Date: 10/28/2024

Other Date:

Agency: 4801 - Panhandle AIDS Support Organization

Funding Source:

Client Id	Date Of Birth	Age	Gender	Race	Ethnicity	Agency	Primary Service	Secondary Service	Subservice Name	Date of Service	UOS Unit	Mode of Transmission	Date of Last Primary Care Visit
127198	3/12/1983	41	Male	American Indian/Alaska Native, White		4801 - Panhandle AIDS Support Organization	Referral for Health Care/Supportive Services	Referral for Health Care/Supportive Services	Eligibility	6/4/2024	4.00	Male to Male sexual contact (MSM),Heterosexual contact,	5/31/2024
127198	3/12/1983	41	Male	American Indian/Alaska Native, White		4801 - Panhandle AIDS Support Organization	Supportive Services	Other Activity	Rx Mail-out Fee	5/9/2024	1.00	Male to Male sexual contact (MSM),Heterosexual contact,	5/31/2024
127198	3/12/1983	41	Male	American Indian/Alaska Native, White		4801 - Panhandle AIDS Support Organization	Referral for Health Care/Supportive Services	Referral for Health Care/Supportive Services	referral	5/20/2024	1.00	Male to Male sexual contact (MSM),Heterosexual contact,	5/31/2024
127198	3/12/1983	41	Male	American Indian/Alaska Native, White		4801 - Panhandle AIDS Support Organization	Health Insurance Premium and Cost Sharing Assistance	Pharmacy Co-Payment		4/15/2024	1.00	Male to Male sexual contact (MSM),Heterosexual contact,	5/31/2024
127312	7/23/1990	34	Male	White		4801 - Panhandle AIDS Support Organization	Referral for Health Care/Supportive Services	Referral for Health Care/Supportive Services	Referral for health care	5/7/2024	1.00	Risk factor not reported or not identified,	2/5/2024
127312	7/23/1990	34	Male	White		4801 - Panhandle AIDS Support Organization	Referral for Health Care/Supportive Services	Referral for Health Care/Supportive Services	Recertification	7/15/2024	4.00	Risk factor not reported or not identified,	2/5/2024
127312	7/23/1990	34	Male	White		4801 - Panhandle AIDS Support Organization	Health Insurance Premium and Cost Sharing Assistance	Health Insurance Premium and Cost Sharing Assistance	Laboratory Service	5/9/2024	1.00	Risk factor not reported or not identified,	2/5/2024
127312	7/23/1990	34	Male	White		4801 - Panhandle AIDS Support Organization	Health Insurance Premium and Cost Sharing Assistance	Health Insurance Premium and Cost Sharing Assistance	Laboratory Service	5/9/2024	1.00	Risk factor not reported or not identified,	2/5/2024

Feature Updates: Sprint 22

Reports STAR Report Screening Enhancements

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

- Two new optional, single-select drop downs, titled '**Was the Substance Use Screening Done**' and '**Was the Mental Health Screening Done**' questions, will display beneath the existing 'Gender' data field.
 - The following picklist values will be available for selection:
 - No
 - Yes
 - If the User indicates the 'Yes' value for the 'Was the Substance Use Screening Done' question, a conditional, optional, multi-select drop down will display, titled '**Substance Use Screening Result**', with the below picklist values available for selection:
 - Agency Declined Referral
 - Negative, No Action Needed
 - Positive, Already in Treatment
 - Positive, Client Declined Referral to Treatment
 - Positive, Referral Submitted
 - If the User indicates the 'Yes' value for the 'Was the Mental Health Screening Done' question, a conditional, optional, multi-select drop down will display, titled '**Mental Health Screening Result**', with the below picklist values available for selection:
 - Agency Declined Referral
 - Negative, No Action Needed
 - Positive, Already in Treatment
 - Positive, Client Declined Referral to Treatment
 - Positive, Referral Submitted
 - If the User indicates the 'No' value for the 'Was the Substance Use Screening Done' and/or 'Was the Mental Health Screening Done' question(s), the conditional, optional, multi-select drop down(s) will not display on the STAR Report.
 - *User must indicate the 'Yes' value(s) for the conditional, optional, multi-select drop down(s) to display.*

Feature Updates: Sprint 22

Reports STAR Report Screening Enhancements Cont.

- When a User indicates value(s) for the new Substance Use and Mental Health data fields, when curating the STAR Report, two results tables, Substance Use and Mental Health, will display on the Accessible View and Download PDF actions, on the View STAR Reports screen, above the Unduplicated Clients results table, displaying the following columns:
 - Client ID
 - Client DOB
 - Program
 - Subprogram
 - Was the Substance Use Screening Done
 - This column will display the 'No' or 'Yes' value indicated by the User when curating the STAR Report.
 - Substance Use Screening Result
 - This column will display the 'Agency Declined Referral', 'Negative, No Action Needed', 'Positive, Already in Treatment', 'Positive, Client Declined Referral to Treatment', and/or 'Positive, Referral Submitted' value(s) indicated by the User when curating the STAR Report.
- The Substance Use results table, found on the Accessible View action, on the View STAR Reports screen, will have the following export capabilities:
 - CSV
 - Excel
 - Word
 - PDF

Feature Updates: Sprint 22

Reports STAR Report Screening Enhancements Cont.

- When a User indicates value(s) for the Substance Use and Mental Health data fields, when curating the STAR Report, two new results tables, Substance Use and Mental Health, will display on the Accessible View and Download PDF actions, on the View STAR Reports screen, above the Unduplicated Clients results table/section, displaying the following columns:
 - Client ID
 - Client DOB
 - Program
 - Subprogram
 - Was the Mental Health Screening Done
 - This column will display the 'No' or 'Yes' value indicated by the User when curating the STAR Report.
 - Mental Health Screening Result
 - This column will display the 'Agency Declined Referral', 'Negative, No Action Needed', 'Positive, Already in Treatment', 'Positive, Client Declined Referral to Treatment', and/or 'Positive, Referral Submitted' value(s) indicated by the User when curating the STAR Report.
- The Mental Health results table, found on the Accessible View action, on the View STAR Reports screen, will have the following export capabilities:
 - CSV
 - Excel
 - Word
 - PDF
- The new Substance Use and Mental Health results tables, found in the Accessible View and Download PDF actions on the View STAR Report screen, will pull the latest screening record(s), based on the date durations indicated by the User, when curating the STAR Report.
- This enhancement is applicable to the Agency Portal only.

Feature Updates: Sprint 22

Reports STAR Report Screening Enhancements Cont.

STAR Report Substance Use and Mental Health Search Criteria

Gender

Select

Was the substance use screening done

Yes

Was the mental health screening done

Yes

Substance use screening result

Agency declined referral × Positive, already in treatment ×

Mental health screening result

Negative, no action needed × Positive, already in treatment ×

☐ WICY Clients Only

Feature Updates: Sprint 22

Reports STAR Report Screening Enhancements Cont.

Substance Use and Mental Health Results Tables on the STAR Report Accessible View Screen

Client ID	Client DOB	Program	Subprogram	Was the mental screening done	Mental Screening Result
No data available for this area					

Client ID	Client DOB	Program	Subprogram	Was the substance use screening done	Substance use screening result
No data available for this area					

Unduplicated Clients		Number of Clients	% of Total
Unduplicated client count		241	--
New clients served		27	11.20%
Deceased clients		0	0.00%

Feature Updates: Sprint 22

Reports STAR Report Screening Enhancements Cont.

Substance Use and Mental Health Results Tables on the STAR Report Download PDF

Client ID	Client DOB	Program	Sub Program	Was The Substance Use Screening Done	Substance Use Screening Result
106243	7/31/1991 12:00:00 AM	THMP	ADAP	Yes	Agency declined referral
105876	8/29/1992 12:00:00 AM	CARE,THMP	RWCARE,ADAP	Yes	Agency declined referral

Client ID	Client DOB	Program	Sub Program	Was The Mental Screening Done	Mental Screening Result
104244	2/15/2000 12:00:00 AM	THMP,CARE	SPAP,RWCARE	Yes	Negative, no action needed
106118	10/10/1980 12:00:00 AM	CARE,THMP	MAI,SPAP	Yes	Negative, no action needed
106243	7/31/1991 12:00:00 AM	THMP	ADAP	Yes	Agency declined referral
105876	8/29/1992 12:00:00 AM	CARE,THMP	RWCARE,ADAP	Yes	Agency declined referral
104693	12/3/2003 12:00:00 AM	CARE	RWCARE	Yes	Agency declined referral

Feature Updates: Sprint 22

Reports Scheduled Client Medication Unordered Report

When a TCT User navigates to the Scheduled Reports, the following enhancements will occur:

- A new hyperlinked Scheduled Report, titled '**Client Medication Unordered Report**', will render in the Search and View Reports results table upon clicking on the 'Search' button, which will route the User to the Client Medication Unordered Report screen.
- The Client Medication Unordered Report will render Clients who are/have been approved for the THMP program but have not placed a medication order in the past 6-months from the generation date. This report will show Active Clients only.
 - *For example, if the report is generated on September 26th, the report will look for Client records from April 1st to September 26th.*
- The following User Roles will have access to the Scheduled Client Medication Unordered Report:
 - HRAR Admin
 - THMP Admin
 - ADAP Order Processor
- The following search criteria will exist on the Client Medication Unordered Report screen:
 - Start Date
 - This will be a mandatory, calendar field.
 - Format: MM/DD/YYYY
 - If the date range indicated for the Start and End Dates falls outside of the 3-month calendar window, the following validation message will display on screen:
 - "The date range you entered is larger than 90 days. Please enter a date range that is 90 days or less."
 - End Date
 - This will be a mandatory, calendar field.
 - Format: MM/DD/YYYY
 - If the date range indicated for the Start and End Dates falls outside of the 3-month calendar window, the following validation message will display on screen:
 - "The date range you entered is larger than 90 days. Please enter a date range that is 90 days or less."
 - The End Date cannot be earlier than the Start Date.
- The Client Medication Unordered Report screen will have the following action buttons:
 - Search
 - Upon clicking the 'Search' button, the Client data will then render in the results table.
 - Reset
 - Upon clicking the 'Reset' button, the Start and End Date fields will be cleared out/reset on screen.

Feature Updates: Sprint 22

Reports Scheduled Client Medication Unordered Report Cont.

- The following column headers will display in the Client Medication Unordered Report results table:
 - Generated Date
 - This column will indicate the Date the Scheduled Client Medication Unordered Report was generated.
 - Format: MM/DD/YYYY
 - Report
 - This column will indicate the 'Client Medication Unordered Report' value for the generated report(s).
 - Value: Client Medication Unordered Report
 - Format
 - This column will display the different export formats for the generated report(s).
 - For each Client Medication Unordered Report that is generated, two rows/records will display in the results table, one with PDF and one with XLS.
 - Values: PDF or XLS
 - Action
 - This column will display the View action for the generated report(s).
 - The View action will open the report output in either the PDF or XLS format.
- The following column headers and System generated values will display in the Client Medication Unordered Report outputs (*PDF or XLS*):
 - Client ID
 - This column will display the Client's unique TCT ID.
 - Client Name
 - This column will display the Client's Name.
 - Format: Last Name, First Name
 - Client DOB
 - This column will display the Client's Date of Birth.
 - Format: MM/DD/YYYY
 - Age
 - This column will display the Client's Age based on the Date of Birth captured in the Client's Profile.
 - Primary Pharmacy Assignment
 - This column will display the Client's Primary Pharmacy Assignment.
 - If no active pharmacy is assigned, this column will display a double dash (--).
 - Format: Pharmacy Code – Pharmacy Name
 - Secondary Pharmacy Assignment
 - This column will display the Client's Secondary Pharmacy Assignment.
 - If no active pharmacy is assigned, this column will display a double dash (--).
 - Format: Pharmacy Code – Pharmacy Name

Feature Updates: Sprint 22

Reports Scheduled Client Medication Unordered Report Cont.

- THMP Eligibility Approved Date
 - This column will display the Client's approved eligibility Decision Date.
 - Format: MM/DD/YYYY
- Eligibility Start Date
 - This column will display the Client's eligibility Start Date.
 - Format: MM/DD/YYYY
- Eligibility End Date
 - This column will display the Client's eligibility End Date.
 - Format: MM/DD/YYYY
- Hold Type
 - This column will display the Hold Type value, sourced from the 'Hold Type' column, for the latest hold record, on the Client's ADAP Holds screen.
 - If no Hold exists for the Client, this column will display a double dash (--).
 - Values: Manual or Automatic
- Hold Reason
 - This column will display the Hold Reason value, sourced from the 'Hold Reason' column, for the latest hold record, on the Client's ADAP Holds screen.
 - If no Hold exists for the Client, this column will display a double dash (--).
 - Values: Returned Mail, Insurance Hold, SPAP Hold, Inactivity Hold, Recertification / Self-Attestation Hold, or Other
- Hold Date
 - This column will display the Hold Date value, sourced from the 'Date' column, for the latest hold record, on the Client's ADAP Holds screen.
 - If no Hold exists for the Client, this column will display a double dash (--).
 - Format: MM/DD/YYYY
- Hold Placed By
 - This column will display the Hold Placed By value (i.e., Username), sourced from the 'Updated By' column, for the latest hold record, on the Client's ADAP Holds screen.
 - If no Hold exists for the Client, this column will display a double dash (--).
- Hold Comments
 - This column will display the Hold Comments value, sourced from the 'Comments' column, for the latest hold record, on the Client's ADAP Holds screen.
 - If no Hold exists for the Client, this column will display a double dash (--).
- The Client Medication Unordered Report will have the following export capabilities:
 - CSV
 - Excel
 - PDF
- This enhancement is applicable to the Agency Portal only.

Feature Updates: Sprint 22

Reports Scheduled Client Medication Unordered Report Cont.

Scheduled Client Medication Unordered Report Screen

Generate Reports

Client Medication Unordered Report Criteria

Start Date *

10/16/2024

End Date *

10/29/2024

Search

Reset

Reports

CSV

XLS

PDF

DOCX

Generated Date	Report	Format	Action
10/24/2024	Client Medication Unordered Report	PDF	View
10/24/2024	Client Medication Unordered Report	XLS	View
10/24/2024	Client Medication Unordered Report	PDF	View
10/24/2024	Client Medication Unordered Report	XLS	View
10/28/2024	Client Medication Unordered Report	PDF	View
10/28/2024	Client Medication Unordered Report	XLS	View
10/28/2024	Client Medication Unordered Report	PDF	View
10/28/2024	Client Medication Unordered Report	XLS	View
10/28/2024	Client Medication Unordered Report	PDF	View
10/28/2024	Client Medication Unordered Report	XLS	View

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Feature Updates: Sprint 22

Reports Scheduled Client Medication Unordered Report Cont.

Scheduled Client Medication Unordered Report Output (*PDF*)

 TEXAS Health and Human Services Texas Department of State Health Services THMP TakeChargeTexas Generated On :10/24/2024 3:56:34 PM													
Pharmacy Medication Unordered Report													
Client ID	Client Name	Client DOB	Age	Primary Pharmacy Assignment	Secondary Pharmacy Assignment	THMP Eligibility Approved Date	Eligibility Start Date	Eligibility End Date	Hold Type	Hold Reason	Hold Date	Hold Placed By	Hold Comments
139225	Felton,Cynthia	4/8/1967	57	791-THMP - TIAP insurance assistance (HOPE)		5/11/2023	11/1/2019	5/31/2020					
130667	Arevalo,Micahael	5/4/1989	35	168-Town & Country Drug		8/22/2022	2/1/2021	6/30/2021					
118214	Southerland,William	6/21/1961	63	327-Walgreen's Pharmacy #13681		9/13/2022	4/30/2021	7/31/2021		Recertification/Self-Attestation Hold			
401121	Herrera,Karl	8/1/1991	33			3/30/2022	12/4/2017	9/30/2021		Insurance hold,Recertification/Self-Attestation Hold			
400768	Renteria,Luis	12/19/1991	32		476-University Health Center Downtown Pharm.	2/25/2022	3/18/2020	11/16/2021	Automatic		7/1/2024	System	

Feature Updates: Sprint 22

Reports Transfer Report Screen Enhancements

When a TCT User navigates to the Accessible Transfer Report, the following enhancements will occur:

- The following search criteria fields will be added to the Transfer Report screen, including:
 - Pharmacy ID
 - This will be an optional, free text field accepting numeric values.
 - The Pharmacy ID value entered will be sourced from the 'Pharmacy ID' column on the Order Transfer screen.
 - Pharmacy Name
 - This will be an optional, free text field accepting alpha-numeric values.
 - The Pharmacy Name value entered will be sourced from the 'Pharmacy Name' field on the Pharmacy Details screen.
 - The Pharmacy Name search field will accept wildcard searches.
 - Drug Code
 - This will be an optional, free text field accepting numeric values.
 - The Drug Code value entered will be sourced from the 'Drug Code' column on the Order Details and Order Transfer screens.
 - Client ID
 - This will be an optional, free text field accepting numeric values.
 - The Client ID entered will reference the 'To Client ID' value.
 - Transfer Start Date
 - This will be a mandatory, calendar field.
 - Format: MM/DD/YYYY
 - If the date range indicated for the Transfer Start and End Dates falls outside of the 1-year calendar window, the following validation message will display on screen:
 - "The date range selected is more than a year. Please refine your date range for a year."
 - Transfer End Date
 - This will be a mandatory, calendar field.
 - Format: MM/DD/YYYY
 - Transfer End Date cannot be earlier than the Transfer Start Date.
 - If the date range indicated for the Transfer Start and End Dates falls outside of the 1-year calendar window, the following validation message will display on screen:
 - "The date range selected is more than a year. Please refine your date range for a year."

Feature Updates: Sprint 22

Reports Transfer Report Screen Enhancements Cont.

- The following search criteria will continue to remain intact on the Transfer Report screen:
 - Order ID
 - This will be an optional, free text field accepting numeric values.
- The following columns will be removed from the Transfer Report results table, including:
 - Drug
 - Item #
 - Name
- The existing 'Ordered' column, found on the Transfer Report results table, will be updated to the following:
 - Transfer Date
 - Format: MM/DD/YYYY
- The following action buttons will be added to the Transfer Report screen:
 - Search
 - This overarching button will replace the existing 'Search' button for the Order ID search criteria.
 - This button will appear below the new Transfer Report search criteria (*i.e., Pharmacy ID, Pharmacy Name, Drug Code, Client ID, Transfer Start Date, and Transfer End Date*).
 - Upon the User clicking on the 'Search' button, the applicable transfer record(s) will render in the results table.
 - Clear Search
 - This button will appear to the right of the new 'Search' button.
 - This button will appear below the new Transfer Report search criteria (*i.e., Pharmacy ID, Pharmacy Name, Drug Code, Client ID, Transfer Start Date, and Transfer End Date*).
 - Upon the User clicking on the 'Clear Search' button, the search criteria will reset/be cleared out on the Transfer Report screen.
- The following column headers and System generated values will display in the Transfer Report results table:
 - Pharmacy ID
 - This column will display the Pharmacy ID value, sourced from the 'Pharmacy ID' column, on the Order Transfer screen.
 - Pharmacy Name
 - This column will display the Pharmacy Name value, sourced from the 'Pharmacy Name' field, on the Pharmacy Details screen.
 - Drug Code
 - This column will display the Drug Code value, sourced from the 'Drug Code' column, on the Order Transfer screen.
 - Trade Name
 - This column will display the Trade Name value, sourced from the 'Trade Name' column, on the Order Transfer screen.

Feature Updates: Sprint 22

Reports Transfer Report Screen Enhancements Cont.

- Generic Name
 - This column will display the Generic Name value, sourced from the 'Generic Name' column, on the Order Transfer screen.
- From Order ID
 - This column will display the Original Order ID value, sourced from the 'Order ID' field, on the Order Details screen.
- To Order ID
 - This column will display the Transfer Order ID value, sourced via the Backend, after the transfer is successfully submitted.
- From Client ID
 - This column will display the Client ID value, for whom the initial order was placed for, sourced from the 'Client ID' column, on the Order Details screen.
- From Client Name
 - This column will display the Client Name value, for whom the initial order was placed for, sourced from the 'Client Name' column, on the Order Details screen.
 - Format: Last Name, First Name
- To Client ID
 - This column will display the Client ID value, for whom the order was transferred to, sourced from the 'Transfer Recipient ID' column, on the Order Transfer screen.
- To Client Name
 - This column will display the Client Name value, for whom the order was transferred to, sourced from the 'Transfer Recipient Name' column on the Order Transfer screen.
- Transfer Date
 - This column will display the Date the transfer occurred pre-populated by the System.
 - Format: MM/DD/YYYY
- Dosage Strength
 - This column will display the Dosage Strength value, sourced from the 'Dosage Strength' column, on the Order Transfer screen.
- Measure
 - This column will display the Measure value, sourced from the 'Measure' column, on the Order Transfer screen.
- Form
 - This column will display the Form value, sourced from the 'Form' column, on the Order Transfer screen.

Feature Updates: Sprint 22

Reports Transfer Report Screen Enhancements Cont.

- Quantity
 - This column will display the Quantity value, sourced from the 'Quantity' column, on the Order Transfer screen.
- Last Ordered Date
 - This column will display the Last Ordered Date value, sourced from the 'Last Ordered Date' column, on the Order Transfer screen, indicating the date the Original Client ID last ordered the medication, before transferring the order to the transfer recipient.
- The Transfer Report will have the following export capabilities:
 - CSV
 - Excel
 - Word
 - PDF
- This enhancement is applicable to the Agency Portal only.

Feature Updates: Sprint 22

Reports Transfer Report Screen Enhancements Cont.

Updated Transfer Report Screen

Transfer Report

Order Id :

Pharmacy ID :

Pharmacy Name :

Drug Code :

Client ID :

Transfer Start Date : *

09/12/2024

Transfer End Date : *

11/05/2024

Q Search

X Clear Search

CSV

XLS

DOC

PDF

Pharmacy ID	Pharmacy Name	Drug Code	Trade Name	Generic Name	From Order ID	To Order ID	From Client ID	From Client Name	To Client ID	To Client Name	Transfer Date	Dosage Strength	Measure	Form	Quantity	Last Ordered Date
905	15RX Pharmacy #2	143	GENVOYA (30/btl)	Genvoya	54856	54858	437775	sdfsd, sfgvsdfg	409438	Molina, Jose	10/28/2024	150;200;10	MG	TAB	1	

15

Showing rows 1 to 1 of 1

1

Feature Updates: Sprint 22

Task Board Restrict Task Board THMP Tasks for Self-Referral CARE Applications

When a TCT User navigates to the Task Board, per the conditions outlined below, the following enhancements will occur:

- For a dual program Client (*a Client who is already approved for both CARE and THMP services*), who then submits a Self-Referral application for additional CARE services only on the My Needs screen, the following updates will occur to the Task Board record:
 - The Self-Referral Task Board record will be updated to display CARE-related transactional data only.
 - The column headers and System generated values for the Self-Referral Task Board record will be updated to the following:
 - Programs
 - This column will display just the 'CARE' value as submitted in the Self-Referral CARE application.
 - THMP Subprogram
 - This column will display the 'Not Applicable' value as THMP is not applicable to the Self-Referral CARE application submitted.
 - THMP Status
 - This column will display the 'Not Applicable' value as THMP is not applicable to the Self-Referral CARE application submitted.
 - HOPWA Status
 - This column will display the 'Not Applicable' value as HOPWA is not applicable to the Self-Referral CARE application submitted.
 - THMP Region
 - This column will display the 'Not Applicable' value as THMP is not applicable to the Self-Referral CARE application submitted.
 - THMP Owner
 - This column will display the 'Not Applicable' value as THMP is not applicable to the Self-Referral CARE application submitted.

Feature Updates: Sprint 22

Task Board Restrict Task Board THMP Tasks for Self-Referral CARE Applications Cont.

- This enhancement will then prevent THMP and HOPWA values/tasks from getting created on the Task Board record(s) when a Self-Referral CARE application is submitted for the Client.
 - This includes updates to the following columns:
 - Programs
 - THMP Subprogram
 - THMP Subprogram Last Updated By
 - THMP Subprogram Last Updated On
 - THMP Status
 - THMP Status Last Updated By
 - THMP Status Last Updated On
 - HOPWA Status
 - HOPWA Sponsor
 - THMP Region
 - THMP Owner
 - THMP Owner Last Updated By
 - THMP Owner Last Updated On

Self-Referral Task Board Record CARE Updates

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

438095

Submitted Start Date

MM/DD/YYYY

Submitted End Date

MM/DD/YYYY

Clear Search

Search

Bulk Assign

Select	Client ID	Client Name	Birth Date	Task Type	Client Updates	P	THMP Subprogram	Emergency App	Emergency App Reason	Date Submitted	CARE Status	THMP Status	HOPWA Status	Agency	CARE Owner	THMP Region	THMP Owner	Actions
☐	438095	Alan Taskboard	08/01/2002	Self Referral		CARE,HOPWA	Not applicable	Not Applicable		10/28/2024	Submitted	Not applicable	Submitted	4816 - The Montrose Center, Inc. Part Is	Unassigned	Not applicable	Not applicable	Edit History

Showing rows 1 to 1 of 1

Task Board History

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	HOPWA Status	HOPWA Sponsor	CARE Agency
10/28/2024 10:43 AM	438095	2213165	CARE,HOPWA	--	--	--	--	--	--	--	--	--	--	Not applicable	--	--	Submitted	--	--	Not applicable	--	4816 - The Montrose Center, Inc. Part Is

Showing rows 1 to 1 of 1

Close

Feature Updates: Sprint 22

Worker Portal Case Screens STI/HEP Test Result Enhancements

When a TCT User navigates to the STI/HEP Details screen within a Client's Profile, the following enhancements will occur:

- The Add STI/HEP Detail Record pop up will display the below question as a conditional, mandatory single-select drop down when the 'STI' value is selected for the Test Type data field and the 'Positive Diagnosis' value is selected for the STI/HEP Test Result data field combination.
 - **Is Your Treatment Complete?**
 - The following picklist values will be available for selection:
 - Yes
 - No
 - Not Applicable
 - Unknown
- When the 'Client STI/HEP Detail' Table Name category is selected, after selecting the 'Contracts, Services, Client Medical and Risk' Data Source via the Ad Hoc Query Builder, the existing 'Is Treatment Complete' Column Name value will be updated to 'Is Your Treatment Complete?'.

Add STI/HEP Detail Record Pop Up Updates

The screenshot displays the 'Add STI/HEP Detail Record' pop-up form. The form contains several fields: 'Test Type' (with 'STI' selected), 'Test' (with 'Select' selected), 'Genital SubGroup' (with 'Select' selected), 'STI/HEP Test Date' (with a date picker), 'STI/HEP Test Result' (with 'Positive Diagnosis' selected), 'Treatment Received for MPox' (with 'Select' selected), 'Lab Value' (with a text input), 'Treatment Indicated' (with 'Select' selected), and 'Is Your Treatment Complete?' (with a dropdown menu). The 'Is Your Treatment Complete?' dropdown is highlighted with a red border and shows a list of options: 'Select', 'No', 'Not Applicable', 'Unknown', and 'Yes'. The 'Select' option is currently selected.

Feature Updates: Sprint 22

Worker Portal Case Screens STI/HEP Test Result Enhancements Cont.

Ad Hoc Query Builder STI/HEP Column Name Updates

Add Table Column Detail Record

Table Name *

Client STI/HEP Detail

Column Name *

Select

Genital Subgroup Code

Is Your Treatment Complete?

Lab Value

STI/HEP Detail Client Id

Test

Feature Updates: Sprint 22

Eligibility My Relationships, Client Financial Information and Countable Income Screen Enhancements

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:

- If a relationship record is removed from either the My Relationships/Client Relationships screens, the following updates will occur to the respective Application Workflow/Client's Profile:
 - Any income source(s) saved for the particular relationship record(s), will be removed from the TCT System, on the Client Financial Information screen.
 - *Only the relationship(s) saved that have a corresponding income record(s) on the My Relationship/Client Relationships screens will reflect on the Client Financial Information screen.*
 - Any income source(s) saved for the particular relationship record(s), will be removed from the TCT System, on the Countable Income screen.
 - *Only the relationship(s) saved that have a corresponding income record(s) on the My Relationship/Client Relationships screens will reflect on the Countable Income screen.*
- This enhancement only applies to Clients who have indicated a source(s) of income for a saved relationship record(s).
- This enhancement is applicable to both the Application Workflow and Client's Profile in both the Agency and Client Portals.
- Any subsequent applications will reflect the latest relationship change(s), as applicable.

Client Removes Saved Relationship Record from My Relationship Screen

Feature Updates: Sprint 22

Eligibility My Relationships, Client Financial Information and Countable Income Screen Enhancements Cont.

System Automatically Removes Saved Income-Relationship Record

Spouse, Partner, or Household Member Source(s) of Income

+

Add an income

Household Member, Spouse, or Partner Name	Income Type	Name of Employer/Income Source	Frequency	Amount 1	Amount 2	Amount 3	Amount 4	Start Date	End Date	Current Income	Total Annual Income	Income Verification Document	Actions

CSV

XLS

PDF

Print

Feature Updates: Sprint 22

Eligibility My Relationships, Client Financial Information and Countable Income Screen Enhancements Cont.

User Removes Saved Relationship Record from Client Relationships Screen

Client Relationships

Relationship Details

Note: All fields marked * are required.

Marital Status ⓘ

What is the Client's current Marital Status? *

Divorced

Divorced Date

MM/DD/YYYY

Household Details

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

No

Yes

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

2

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

1

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

1

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
Other	TEST	--	TEST	09/01/2003	21	--	--	Active	Yes	--	123 Test St	--	TX	TEXAS	Harris	71000	(972) 878-7387	10/08/2024 3:27:47 PM	edit delete history

Showing rows 1 to 1 of 1

Save Changes

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Feature Updates: Sprint 22

Eligibility My Relationships, Client Financial Information and Countable Income Screen Enhancements Cont.

System Automatically Removes the Income-Relationship Record from the Client Financial Information Screen

Client Financial Information

If the income being reporting is not a regularly received income (ex: odd jobs) please total the income amount for the year and report it as an annual income. For example, if the Client provided a service for 3 weeks at \$100/week this year, report \$300 as an annual income, not \$100 as a weekly income

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

In the last 30 days, has the Client had a source of income? *

No

Yes

In the last 30 days, has the Client's spouse had a source of income?

No

Yes

Your Source(s) of Income

+

Add an income

Income Type	Name of Employer/Income Source	Frequency	Amount 1	Amount 2	Amount 3	Amount 4	Start Date	End Date	Current Income	Total Annual Income	Income Verification Document	Actions
No income records added.												

15

Showing rows 0 to 0 of 0

Spouse, Partner, or Household Member Source(s) of Income

Household Member, Spouse, or Partner Name	Income Type	Name of Employer/Income Source	Frequency	Amount 1	Amount 2	Amount 3	Amount 4	Start Date	End Date	Current Income	Total Annual Income	Income Verification Document	Actions
No income records added.													

15

Showing rows 0 to 0 of 0

Save Changes

Feature Updates: Sprint 22

Eligibility My Relationships, Client Financial Information and Countable Income Screen Enhancements Cont.

System Automatically Removes the Income-Relationship Record from Countable Income Screen

Countable Income

The countable incomes selected below were recommended by the system using program guidelines. If you would like to override this recommendation, you can update the checkboxes in the table below.

Individual	Relationship	Calculated Total Annual Income	Type	Employer	Start Date	End Date	System Recommends	Countable for Household Income calculation
No household members found.								

50

Showing rows 0 to 0 of 0

Back

Next

Feature Updates: Sprint 22

Client Merge Client Merge Request

When a TCT User navigates to the Client Merge drop down via the 'Admin' tile, the following enhancements will occur:

- A new hyperlink, titled '**Client Merge Request Submission**', will display on the left navigate pane, routing the User to the Client Merge Request Submission screen.
- The following Help Text will display beneath the Client Merge Request Submission title, stating the following:
 - "Please enter the IDs of the clients you want to request for submission for merge."
- The following search criteria will display on the Client Merge Request Submission screen:
 - Client ID 1
 - This will be a mandatory, free text field accepting numeric values.
 - Client ID 2
 - This will be a mandatory, free text field accepting numeric values.
- The following action button will exist on the Client Merge Request Submission screen:
 - Submit Request
 - The User will click on the 'Submit Request' button to submit the merge request for the two Client IDs indicated.
 - After successfully clicking on the 'Submit Request' button, after inputting both the 'Client ID 1' and 'Client ID 2' data fields, the following validation message will display on the top banner of the Client Merge Request Submission screen:
 - "You have successfully submitted request for client merge. HRAR Admin will review and provide a decision."
- Once the merge request is submitted, in real-time, the Duplicate Client Identification batch job will run, creating a record for the two Client IDs and associated Client information, included in the merge request, on the Duplicate Identification Report screen.
 - HRAR Admin will have the ability/permissions to click on the 'Yes' or 'No' radio buttons for the respective record, providing a decision.
- If either Client ID 1 or Client ID 2 already exists on the Duplicate Client Identification Report, and is awaiting a decision, the below validation message will display on the Client Merge Request Submission screen:
 - "Client ID ##### is queue to be merged with another Client ID. Please refine the ID entered."
 - "#####' represents the Client ID which is already picked up by the Duplicate Client Identification Report.

Client Merge Request Submission Screen

✓ You have successfully submitted request for client merge. HRAR Admin will review and provide a decision.

Client Merge Request Submission

Please enter the IDs of the clients you want to request for submission for merge.

Client ID 1 *

Client ID 2 *

Submit Request

Feature Updates: Sprint 22

Pharmacy Pharmacy Search Screen Enhancement

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

- Per the enhancement, when an HRAR Admin User clicks on the 'Search' action button, without any search criteria entered, all pharmacies in the TCT System will render in the results table.
 - HRAR Admin will no longer have to enter search criteria to populate pharmacy records on the Pharmacy Search screen.
 - *This functionality will continue to remain intact if the HRAR Admin User chooses to refine their pharmacy search from the list of pharmacies rendered.*
 - All associated pharmacy values will sync in accordance with the list of pharmacies rendered, including:
 - Pharmacy Code
 - Pharmacy Name
 - Pharmacy Status
 - Pharmacy License Number
 - Address
 - City
 - Zip Code
 - Site Type
 - Primary Phone Number
 - Dropped Date
- Per the enhancement, Pharmacy Users will now have the capability to edit specific pharmacy information on the Pharmacy Details screen, including:
 - Pharmacy Name
 - License #
 - Contact
 - Primary Phone
 - Medicaid ID
 - Email
 - Secondary Phone
 - Vendor ID
 - Fax
 - Contract Effective Begin Date
 - Contract Effective End Date
 - Approved Date

Feature Updates: Sprint 22

Pharmacy Pharmacy Search Screen Enhancement Cont.

- Max Client Reached?
- Max Client Threshold
- Site Usage Designation
- Site Usage Information
- Title
 - *Relates to Shipping Address*
- Address Line 1
 - *Relates to Shipping Address*
- Address Line 2
 - *Relates to Shipping Address*
- City
 - *Relates to Shipping Address*
- State
 - *Relates to Shipping Address*
- County
 - *Relates to Shipping Address*
- Zip Code
 - *Relates to Shipping Address*
- Title
 - *Relates to Mailing Address*
- Address Line 1
 - *Relates to Mailing Address*
- Address Line 2
 - *Relates to Mailing Address*
- City
 - *Relates to Mailing Address*
- State
 - *Relates to Mailing Address*
- County
 - *Relates to Mailing Address*
- Zip Code
 - *Relates to Mailing Address*

Feature Updates: Sprint 22

Pharmacy Pharmacy Search Screen Enhancement Cont.

- Title
 - *Relates to Copay Address*
- Address Line 1
 - *Relates to Copay Address*
- Address Line 2
 - *Relates to Copay Address*
- City
 - *Relates to Copay Address*
- State
 - *Relates to Copay Address*
- Zip Code
 - *Relates to Copay Address*
- Select Note Category
- Note
- Per the enhancement, Pharmacy Users will **not** have the capability to edit specific pharmacy information on the Pharmacy Details screen, including:
 - Dropped Date
 - *This data field will remain non-editable/grayed out for Pharmacy Users.*

Feature Updates: Sprint 22

Pharmacy Pharmacy Search Screen Enhancement Cont.

HRAR Admin User Conducts Pharmacy Search with no Search Criteria Entered

Pharmacy Search

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

Pharmacy Code

City

Pharmacy Status

Select an Option

Pharmacy Name ⓘ

Zip Code

Site Type

Select

Pharmacy License Number

Search

New Pharmacy

CSV

Excel

PDF

Print

Pharmacy Code	Pharmacy Name	Pharmacy Status	Pharmacy License Number	Address	City	Zipcode	Site Type ⓘ	Primary Phone Number	Dropped Date
572	**CLOSED**Randall's Pharmacy #2480	Deactivated	22067	6600 Mopac Expwy S	Austin	78749	Primary Participating Pharmacy	(512) 891-4360	08/11/2021
402	**DROP** Davila Pharmacy	Deactivated	01055	1423 Guadalupe St., Ste 108	San Antonio	78207	Primary Participating Pharmacy	(210) 226-5293	03/29/2021
339	**DROP**ReCept Pharmacy #54	Deactivated	23065	9150 Huebner Rd., Suite 125	San Antonio	78240	Primary Participating Pharmacy	(210) 614-5506	05/06/2021
746	**DROP**Rite Care Pharmacy	Deactivated	26287	7560 Greenville Avenue	Dallas	75231	Primary Participating Pharmacy	(214) 421-2210	09/23/2021
781	**DROP**Safemed Pharmacy	Deactivated	40936	Duplicate To Pcy 810, Incorr Addy	Dallas	75228	Primary Participating Pharmacy	(972) 412-7373	09/11/2019

Feature Updates: Sprint 22

Pharmacy Pharmacy Search Screen Enhancement Cont.

Pharmacy User Editing Capabilities on Pharmacy Search Screen (Excludes 'Dropped Date' Field)

Pharmacy Details

If you are creating a new pharmacy, make sure you do a search first before you create one to avoid creating a duplicate.

Pharmacy Name *

100000 DRUGS 4010

Contract

Kerry Corp, RPh.

State

Year

2025-01-01

Approved Date

11/01/2023

Max Client Threshold

Pharmacy Code

43

Pharmacy Phone *

214/261-3530

Secondary Phone

950-882-8882

Contract (Default) Begin Date

01/01/2025

Dropped Date

11/01/2023

Site Change Investigation *

Primary Participating Pharmacy

License # *

0000

Medicaid ID

Vendor ID *

0000000000000000

Contract (Default) End Date

01/01/2025

Max Client Backlog?

☐ No ☐ Yes

Site Design Information

Shipping Address

Title

Pharmacy (Department)

City *

Batch Springs

State *

TX

Address Line 1 *

11001 Elm

Address Line 2

REACTIVE PHARMACY

County

Dallas

Zip Code *

75180

Mailing Address

Title

Pharmacy (Department)

City *

Batch Springs

State *

TX

Address Line 1 *

11001 Elm

Address Line 2

REACTIVE PHARMACY

County

Dallas

Zip Code *

75180

Coping Address

Title

City

State

Select

Address Line 1

Address Line 2

County

Zip Code

Pharmacy Notes

Add a Note

Select Note Category

Select

Note

You have 5000 characters remaining.

All Notes

Note Category

Select

Note

Select an Option

Filter

Feature Updates: Sprint 22

Agency Client Portal Pages Facility Information Enhancement

When a TCT User navigates to the Emergency Screening page of an Application Workflow, the following enhancements will occur:

- Per the enhancement, when a User indicates the 'Yes' radio button for the 'Have you been recently incarcerated (in the last 6 months)?' question on the Emergency Screening page of an Application Workflow, the following updates will occur:
 - A new optional, conditional set of questions will display.
 - Header: Facility Information
 - Sub Text: "Please enter any incarceration facility information for the client in the fields below, if applicable."
 - *The sub text will display beneath the 'Facility Information' header.*
 - The following fields will display beneath the header and sub text, including:
 - Approximate Date of Release
 - This will be an optional, conditional calendar field.
 - *Dependent on the User indicating 'Yes' to the 'Have you been recently incarcerated (in the last 6 months)?' question*
 - Facility Name
 - This will be an optional, conditional free text field.
 - *Dependent on the User indicating 'Yes' to the 'Have you been recently incarcerated (in the last 6 months)?' question.*
 - TDCJ or SPN Number or Correctional ID
 - This will be an optional, conditional free text field accepting alpha-numeric values.
 - *Dependent on the User indicating 'Yes' to the 'Have you been recently incarcerated (in the last 6 months)?' question.*
 - Did the Client Receive Medication Upon Release?
 - This will be an optional, conditional radio button field.
 - *Dependent on the User indicating 'Yes' to the 'Have you been recently incarcerated (in the last 6 months)?' question.*
 - The following values will be available for selection:
 - Yes
 - No
 - How Much Medication did the Client Receive?
 - This will be an optional, conditional free text field accepting alpha-numeric values.
 - *Dependent on the User indicating 'Yes' to the 'Have you been recently incarcerated (in the last 6 months)?' question.*

Feature Updates: Sprint 22

Agency Client Portal Pages Facility Information Enhancement Cont.

- If a User indicates the 'No' radio button for the 'Have you been recently incarcerated (in the last 6 months)?' question on the Emergency Screening page of an Application Workflow, the optional, conditional set of questions will not display.
 - *The 'N/A' value will then appear for the Facility Information attributes on the Application Review Summary screen.*
- The Facility Information optional, conditional, succeeding questions is applicable across all Application Types, including:
 - New Application
 - Recertification
 - Self-Attestation
 - Change Request
 - Referral
- If a User does indicate the 'Yes' radio button for the 'Have you been recently incarcerated (in the last 6 months)?' question and completes the optional, conditional, succeeding Facility Information questions on the Application Workflow, the Facility Information will then save to the Client's Profile, under the 'Facility Information' section on the About You screen.
 - The System will then pre-populate the saved values, indicated by the User via the Application Workflow, in the Client's Profile.
 - The Facility Information fields, pre-populated under the 'Facility Information' section on the About You screen, when a Facility Information record is successfully saved via the Application Workflow, will be editable and ungrayed, so the User can make edit(s)/update(s) to the record as needed, which will be captured/logged by clicking on the 'Facility Information History' action button.
 - *User must click on the 'Save Changes' action button within a Client's Profile to successfully save the Facility Information edit(s)/update(s).*
 - If a User indicates the 'No' radio button for the 'Have you been recently incarcerated (in the last 6 months)?' question on the Application Workflow, the Facility Information will then appear empty in the Client's Profile, under the 'Facility Information' section on the About You screen.
 - The Facility Information fields, which will appear empty/blank under the 'Facility Information' section on the About You screen, will be editable and ungrayed, so the User can add a Facility Information record as needed if not initially captured via the Application Workflow, which will be captured/logged by clicking on the 'Facility Information History' action button.
 - *User must click on the 'Save Changes' action button within a Client's Profile to successfully add the Facility Information record.*
- The saved Facility Information, captured within the Application Workflow, will display on the Application Review Summary screen.
- The saved Facility Information, captured within the Client's Profile, will display under the 'About Me' section in the Application History screen's Accessible View and Download PDF actions.
 - *This includes Past Case Information.*
- The saved Facility Information, captured within the New Application Workflow, will then appear in subsequent applications on the Emergency Screening page.
- The corresponding Spanish translations will exist in the Client Portal.
- This enhancement is applicable to the Application Workflow and Client's Profile in both the Agency and Client Portals.

Feature Updates: Sprint 22

Agency Client Portal Pages Facility Information Enhancement Cont.

Facility Information Updates on Emergency Screening Page of Application Workflow

Emergency Screening

Please fill out this quick screener before continuing with registration.

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

Are you under 24 years old?

☐ No ☐ Yes

Are you pregnant?

☐ No ☐ Yes

Are you experiencing homelessness?

☐ No ☐ Yes

Have you been recently incarcerated (in the last 6 months)?

☐ No ☒ Yes

Facility Information

Please enter any incarceration facility information for the client in the fields below, if applicable.

Approximate Date of Release

19/23/2026

Facility Name

TEST

TDCJ or SPN Number or Correctional ID

123456

Did the Client Receive Medication Upon Release?

☒ No ☐ Yes

How Much Medication did the Client Receive?

Is your CD4 count below 100?

☐ I don't know ☐ No ☐ Yes

Have you been out of care for more than 6 months?

☐ No ☐ Yes

Back

Save & ExitContinue

Feature Updates: Sprint 22

Agency Client Portal Pages Facility Information Enhancement Cont.

Facility Information Saved to Application Review Summary Screen

Review Application

Emergency Screening

Are you under 24 years old: **N/A**

Are you pregnant: **N/A**

Are you experiencing homelessness: **N/A**

Have you been recently incarcerated (in the last 6 months): **Yes**

Approximate Date of Release **10/23/2026**

Facility Name **TEST**

TDCJ or SPN Number or Correctional ID **123456**

Did the Client Receive Medication Upon Release? **No**

How Much Medication did the Client Receive? **N/A**

Is your CD4 count below 100: **N/A**

Have you been out of care for more than 6 months: **N/A**

Feature Updates: Sprint 22

Agency Client Portal Pages Facility Information Enhancement Cont.

Saved Facility Information Then Reflects in Client's Profile

Facility Information
Please enter any incarceration facility information for the client in the fields below, if applicable.

Approximate Date of Release

10/23/2026

Facility Name

TEST

Correctional ID No

123456

Did the Client Receive Medication Upon Release?

No

Yes

How Much Medication Did the Client Receive?

🕒 Facility Information History

Feature Updates: Sprint 22

Agency Client Portal Pages Facility Information Enhancement Cont.

Saved Facility Information Then Reflects in Subsequent Applications

Emergency Screening

Please fill out this quick screener before continuing with registration.

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

Are you under 24 years old?

☐ No ☐ Yes

Are you pregnant?

☐ No ☐ Yes

Are you experiencing homelessness?

☐ No ☐ Yes

Have you been recently incarcerated (in the last 6 months)?

☐ No ☒ Yes

Facility Information

Please enter any incarceration facility information for the client in the fields below, if applicable.

Approximate Date of Release

Facility Name

TDCJ or SPN Number or Correctional ID

Did the Client Receive Medication Upon Release?

☒ No ☐ Yes

How Much Medication did the Client Receive?

Is your CD4 count below 100?

☐ I don't know ☐ No ☐ Yes

Have you been out of care for more than 6 months?

☐ No ☐ Yes

[Back](#)

[Save & Exit](#) [Continue](#)

Feature Updates: Sprint 22

Agency Client Portal Pages Contact Preference Enhancements

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

- Beneath the 'Contact Preferences' sub section, the following updates will occur:
 - There will be an informational icon to the right of the 'Contact Preferences' header, stating the following:
 - "If mail is selected, you will receive a postal mail. You will be contacted via the preference(s) selected."
 - The corresponding Spanish translation will exist in the Client Portal:
 - "Si selecciona correo, recibirá correspondencia postal. Será contactado(a) a través de la(s) preferencia(s) seleccionada(s)."
- Per the enhancement, there will be no default contact preference type(s) pre-selected when a User navigates to the Contact Preferences section.
 - Users will have to manually select their contact preference(s).
 - Based on the contact preference(s) selected by the User, the conditional, succeeding questions will display on screen:
 - When 'Email' is selected as the contact preference, the following mandatory, radio button question will display:
 - 'Should emails be confidential?'
 - The 'Yes' pre-selected value will appear.
 - *The User can manually update the pre-selected value if needed.*
 - When 'Mail' is selected as the contact preference, the following, mandatory radio button question will display:
 - 'Can we contact you via mail?'
 - This will be the updated language replacing the existing 'Should mail be confidential?' question.
 - The following Spanish translation will exist in the Client Portal for the 'Can we contact you via mail?' question:
 - Spanish translation: ¿Podemos contactarlo(a) por correo postal?
 - *The 'Should mail be confidential?' question will be completely removed from the screens as per the enhancement.*
 - There will be no pre-selected value for this question.
 - *Users will have to manually select their preference.*
 - When 'Primary Phone' is selected as the contact preference, the following mandatory, radio button questions will display:
 - 'Can we call you on your primary phone?'
 - The 'Yes' pre-selected value will appear.
 - *The User can manually update the pre-selected value if needed.*
 - 'Can we text you on your primary phone?'
 - The 'Yes' pre-selected value will appear.
 - *The User can manually update the pre-selected value if needed.*
 - 'Can we leave a voice message on your primary phone?'
 - The 'Yes' pre-selected value will appear.
 - *The User can manually update the pre-selected value if needed.*

Feature Updates: Sprint 22

Agency Client Portal Pages Contact Preference Enhancements Cont.

- Should primary phone voice message be confidential?
 - There will be no pre-selected value for this question.
 - Users will have to manually select their preference.
 - When a User selects 'No' to the 'Can we leave a voice message on your primary phone?' question, then the 'Should primary phone voice message be confidential;?' question will become optional.
- This enhancement is applicable across all Application Types, including:
 - New Application
 - Recertification
 - Self-Attestation
 - Change Request
 - Referral
- The Contact Preference(s) selections will appear in the Application Review Summary screen of an Application Workflow.
 - The existing Contact Preference questions will be removed from the Application Review Summary screen, including:
 - Should alternative emails be confidential?
 - Can we text you on your secondary phone?
 - Can we call you on your secondary phone?
 - Can we leave a voice message on your secondary phone?
 - Should secondary phone voice messages be confidential?
- The Contact Preference(s) selections will appear in the Application History screen's Accessible View and Download PDF actions of a Client's Profile.
 - The existing Contact Preference questions will be removed from the Accessible View and Download PDF actions, including:
 - Should alternative emails be confidential?
 - Can we text you on your secondary phone?
 - Can we call you on your secondary phone?
 - Can we leave a voice message on your secondary phone?
 - Should secondary phone voice messages be confidential?
- Any existing Client Profiles with the saved 'Should mail be confidential?' value will continue to remain intact.
- Any saved Contact Preference(s) in a New Application will appear in subsequent applications with the ability to edit as needed.
- There can be several variations/combinations of Contact Preference(s) which will dictate the question(s) that display under the 'Contact Preferences' section in both the Application Workflow and 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 22

Agency Client Portal Pages Contact Preference Enhancements Cont.

Contact Preferences Updates on the Application Workflow (*No Pre-Selected Values*)

Other Contact Info

Email *

AlexContact@yopmail.com

Alternate Email

Primary Phone *

(323) 423-4444

Secondary Phone

(###) ###-####

Contact Preferences ⓘ

Select how you would like to be contacted going forward. This will help us understand how we can get in touch with you about your services. If mail is selected, you will receive a postal mail. You will be contacted via the preference(s) selected. *

Select ▼

Feature Updates: Sprint 22

Agency Client Portal Pages Contact Preference Enhancements Cont.

Contact Preferences Updates on the Application Workflow (*Value(s) Selected*)

Other Contact Info

Email *

AlexContact@yopmail.com

Alternate Email

Primary Phone *

(323) 423-4444

Secondary Phone

((###) ###-####

Contact Preferences ⓘ

Select how you would like to be contacted going forward. This will help us understand how we can get in touch with you about your services. If mail is selected, you will receive a postal mail. You will be contacted via the preference(s) selected. *

Primary Phone x

Email x

Mail x

x ▾

Can we contact you via mail? *

Yes

Should emails be confidential? *

Yes

Can we call you on your primary phone? *

Yes

Can we text you on your primary phone? *

Yes

Can we leave a voice message on your primary phone?

Yes

Should primary phone voice message be confidential? *

Yes

Feature Updates: Sprint 22

Agency Client Portal Pages Contact Preference Enhancements Cont.

Contact Preferences Updates in the Application Review Summary Screen

Contact Preferences

How do you want us to contact you: **Primary Phone, Email, Mail**

Can we contact you via mail? **Yes**

Can we call you on your primary phone: **Yes**

Can we leave a voice message on your primary phone: **Yes**

Should emails be confidential: **Yes**

Can we text you on your primary phone: **Yes**

Should primary phone voice message be confidential: **Yes**

Feature Updates: Sprint 22

Agency Client Portal Pages Contact Preference Enhancements Cont.

Contact Preferences Updates in a Client's Profile

Other Contact Info

Email *

AlexContact@yopmail.com

Alternate Email

Primary Phone *

(323) 423-4444

Secondary Phone

(###) ###-####

Contact Preferences

Select how you would like to be contacted going forward. This will help us understand how we can get in touch with you about your services. If mail is selected, you will receive a postal mail. You will be contacted via the preference(s) selected. *

Mail × Email × Primary Phone × × ▾

Can we contact you via mail? *

No

Yes

Should emails be confidential? *

No

Yes

Can we call you on your primary phone? *

No

Yes

Can we text you on your primary phone? *

No

Yes

Can we leave a voice message on your primary phone?

No

Yes

Should primary phone voice message be confidential? *

No

Yes

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Feature Updates: Sprint 22

Agency Client Portal Pages Contact Preference Enhancements Cont.

Contact Preferences Updates in Application History Accessible View and Download PDF Actions

Contact Preferences

How do you want us to contact you: **Primary Phone, Email, Mail**

Can we contact you via mail?: **Yes**

Can we call you on your primary phone: **Yes**

Can we leave a voice message on your primary phone: **Yes**

Should emails be confidential: **Yes**

Can we text you on your primary phone: **Yes**

Should primary phone voice message be confidential: **Yes**

How do you want us to contact you

Primary Phone
Email
Mail

Can we contact you via mail?

Yes

Should emails be confidential?

Yes

Can we text you on your primary phone

Yes

Can we call you on your primary phone

Yes

Can we leave a voice message on your primary phone

Yes

Should primary phone voice message be confidential

Yes

