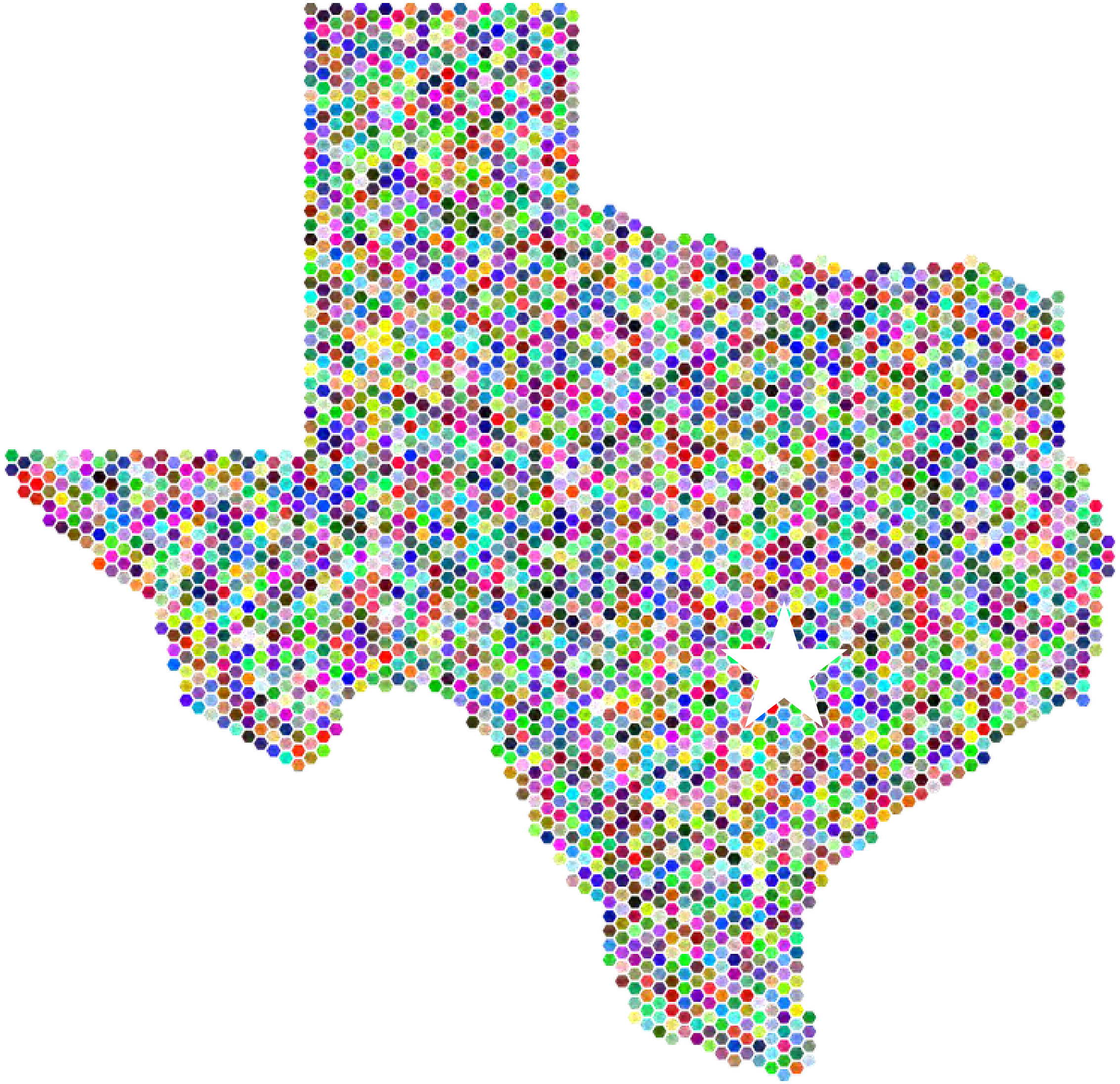
# Take Charge Texas (TCT) Demonstration

April 20th, 2023



# Meet the Facilitators

## DSHS/HHSC TEAM

**Charletha Joseph**
Program Support

**Mahesh Rajapaske**
Program Support

**Rachel Sanor**
THMP Manager

**Christine Salinas**
ADAP Manager

**Holly Benavides**
TCT Help Desk Manager

**Ramani Siddharthan**
TCT Help Desk

**Hillary Alamene**
Program Specialist

## DELOITTE TEAM

**Nikki Fernandes**
Project Manager

**Meeta Sharma**
Test Lead

**Hunter Chernyha**
Team Lead/Scrum Master

**Krishna Dixit**
Consultant/Discovery

# Agenda

1 Introduction & Overview of Objectives

2 TCT Roadmap

3 System Overview: New TCT Features

4 Gathering Your Feedback

5 Close Out & Next Steps

**How to Ask Questions:**

All lines are muted.

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

# Poll Everywhere

## Poll Everywhere

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

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

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

**What do you hope to learn through this session?**

# Today's Objectives

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

## SYSTEM AWARENESS

Provide this group with **transparency** surrounding the TCT roadmap & future system enhancements so that end-users **gain direct knowledge** of the features we have & plan to implement in TCT.

## GATHER FEEDBACK

Gather your **feedback** and **assess opportunities for improvement** of the TCT system.

## UPDATE TCT ROADMAP

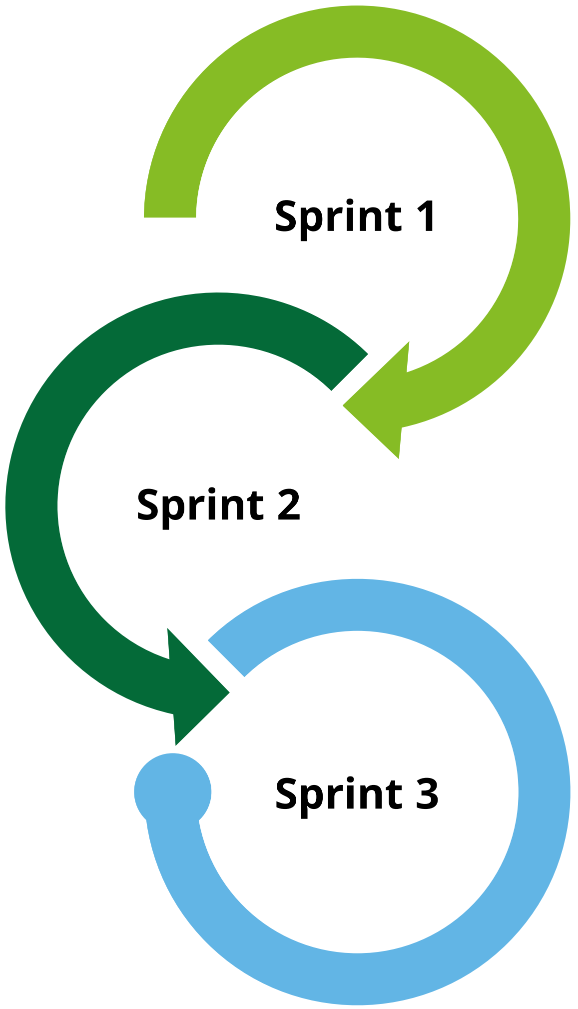
Review the feedback received with leadership, **prioritize** the features, & **update the TCT Roadmap** accordingly.

# TCT Roadmap

# Project Plan: Successfully Completed Features

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




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

- 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

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

- 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

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**Focused on establishing an automated client merge process which reduced the lengthy manual client merge process, updating Share Status capabilities, and further enhancing task board features**

- 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

 

# Project Plan: Short-Term

The graphic below represents the features that we will develop over the next few months and the anticipated impact it will have on TCT users and clients. *

| April | | May | June |
|---|---|---|---|
| Sprint 3 | Sprint 4 | Sprint 5 | Sprint 6 |

### Pharmacy Portal
The Pharmacy Portal will provide users will capability to order medications, add medications to client's regimen, ability to add limitations/overrides on medications, hence enabling more efficient, streamlined process for providing medication services to TCT clients.

### Worker Portal Eligibility
Worker Portal Eligibility will provide a comprehensive approach to determine the eligibility of clients based on Standard Deduction and FPL, hence enabling them to receive benefits of the TCT System.

### Worker Portal Case Intake
Worker Portal Case Intake will enable TCT users to input relationship information for a client when creating an application, enabling a streamlined intake process.

### Pharmacy Reports
Pharmacy Reports will provide THMP staff with a comprehensive view on medications, hence providing insights to make downstream decisions.

### Agency Portal Client Pages
Agency Portal Client Pages will provide TCT users capability to inactivate clients, view their inactive client's information, enabling TCT users to update clients as needed.

### CARE Plans
CARE Plans will provide users with the capability to update services treatment plan screen, enabling a streamlined process to document services provided.

### Share Status
Share Status will provide users capability to search and create clients, hence enabling flexible search capabilities.

### Insurance Verification
HMS will provide users with capability to view recoupment information, enabling users with additional information to provide services to TCT clients.

### Task Board
Task Board will provide users with the capability to assign tasks to users in bulk, enabling a faster workflow for TCT Users.

**This project plan is subject to change as priorities may change.*

 

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

 

# System Overview: **New** TCT Features

# Live Demonstration of TCT Features

## TCT Features Video Presentation

Case Notes
Share Status
Task Board
HIV/THMP Split
Automated Client Merge

 

# Gathering Your Feedback

# Poll Everywhere

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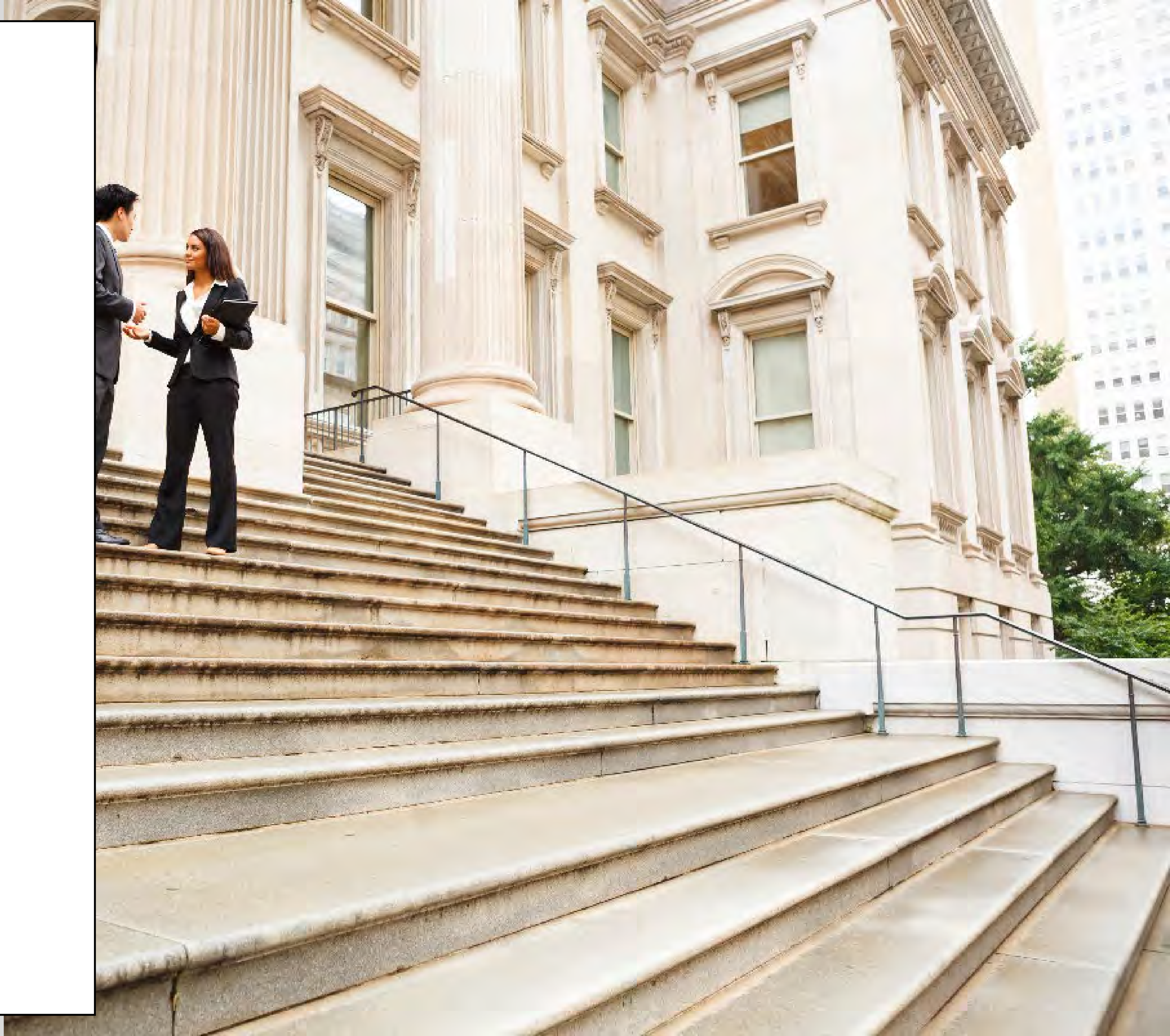
**What additional items would you like to see for these sessions?**

# Next Steps



# Upcoming Activities

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

**Charletha Joseph**

Charletha.Joseph@dshs.texas.gov

**Mahesh Rajapakse**

Mahesh.Rajapakse@dshs.texas.gov

- ☐ Our team will **share this presentation** with this group following this session.
- ☐ Our team will host the **next TCT User Engagement session** on Thursday, May 18th.
- ☐ Our team will be sharing a **brief survey** to gather additional feedback, suggestions, or recommendations for the TakeChargeTexas application.

  *(Further communication to come on this topic!)*

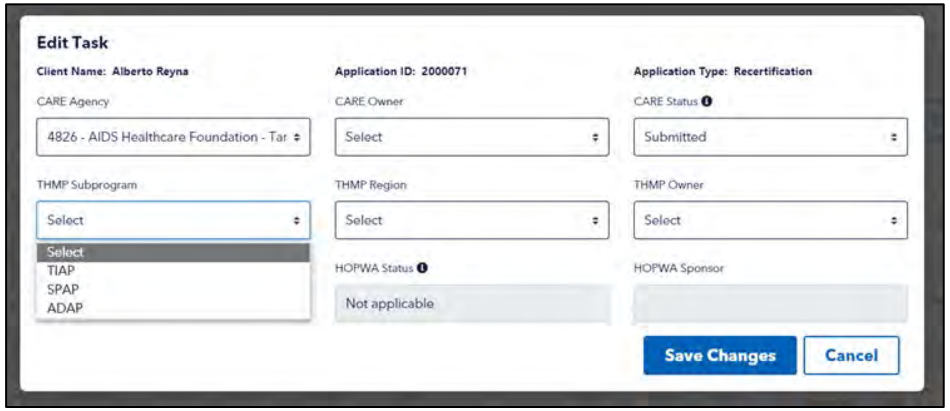
 

# Thank You!

# System Overview: **New** TCT Features

# Feature Updates: Sprint 3

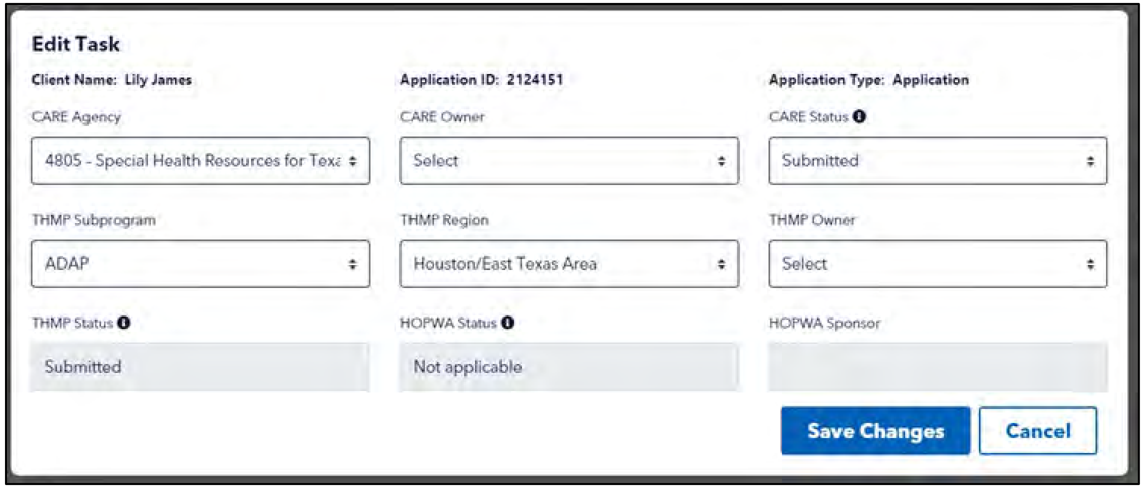
## Update THMP Subprogram





TCT users will be able to update a task's THMP Subprogram in the task board therefore ensuring alignment of tasks under THMP program.

## Update Task Board

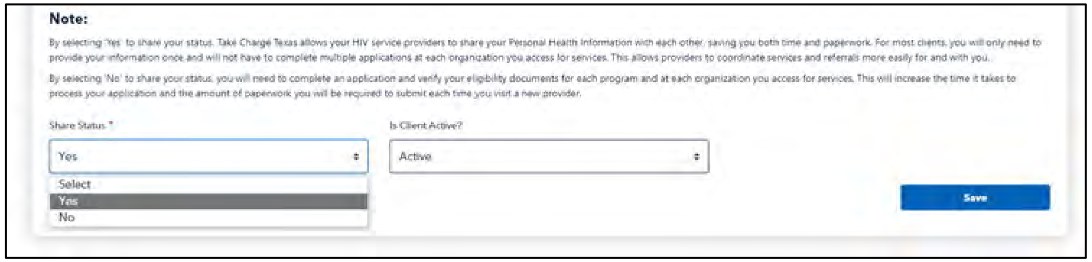



TCT users will be able to view tasks on the Task Board that they have submitted applications for, even if that task is of a different program, therefore ensuring that visibility into those tasks is not lost.

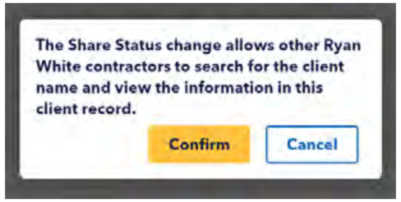
# Feature Updates: Sprint 3

## Update Share Status

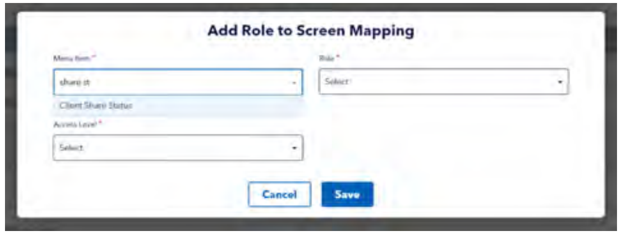


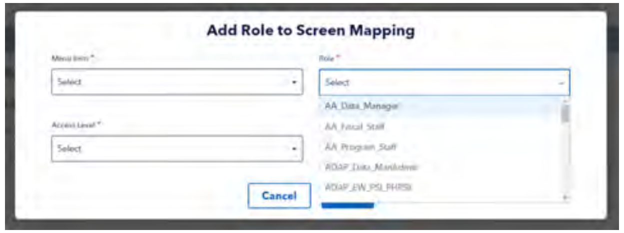

When changed from Yes to No, they will be required to select the Provider Agency

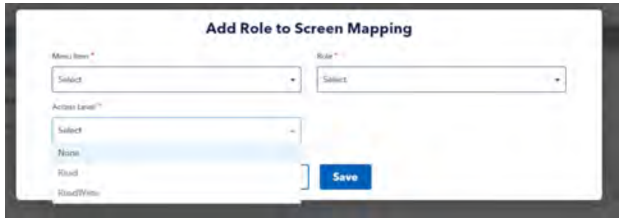

When changed from No to Yes, there will be an informational text displayed, to be confirmed to proceed with No to Yes change




*At the time of client creation, all users can enter in their initial response to Share Status. **For users to be able to update the Share Status, users will have to have the required access level.** Admins will need to add the user role which will have certain level of access to update Share Status. Once the change is deployed in production, then the below access will need to be set up.*



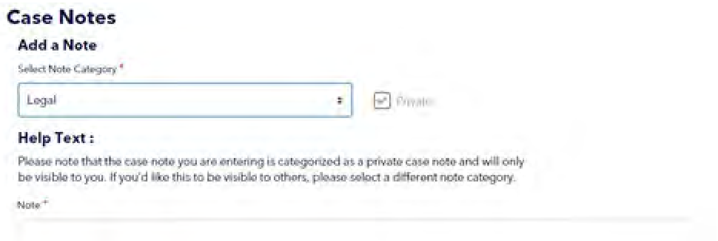



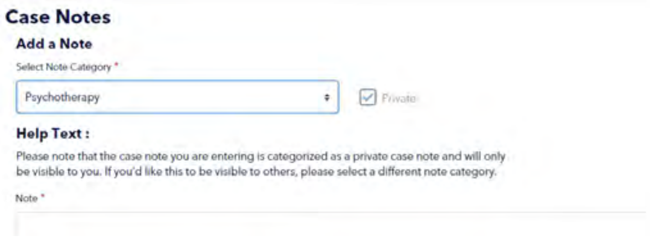

 

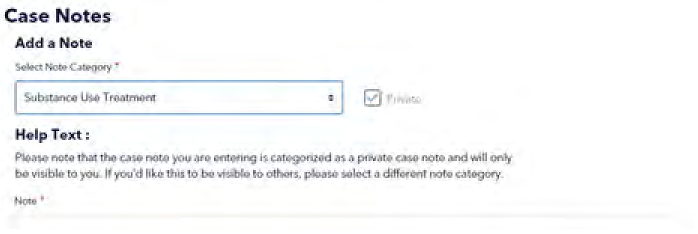
# Feature Updates: Sprint 3

## Private Case Note

For the following case note categories, it will be automatically categorized as private with the following help text: Legal, Psychotherapy and Substance Use Treatment




For the following case note categories, an option to categorized as private will be available: Medical Case Management, Non-Medical Case Management, and Other

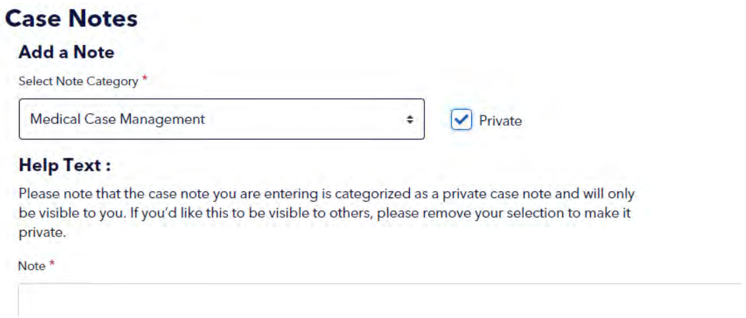

TCT users will be able be to choose whether the case note written by the user can be shared with other users or not, therefore ensuring privacy considerations are intact for specific case note categories, if needed.

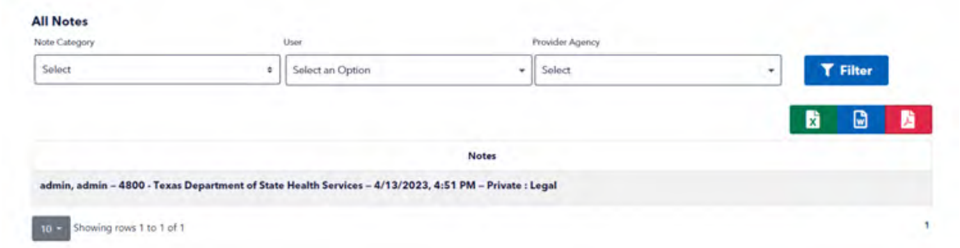
# Feature Updates: Sprint 3

## Private Case Note (Continued)

Once marked as private, the following help text will appear:




For private case notes, user will be able to view the case note header information, not the actual case note




TCT users will be able be to choose whether the case note written by the user can be shared with other users or not, therefore ensuring privacy considerations are intact for specific case note categories, if needed.

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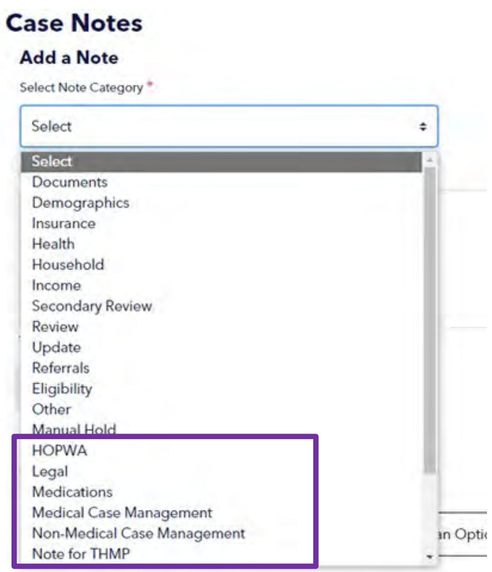
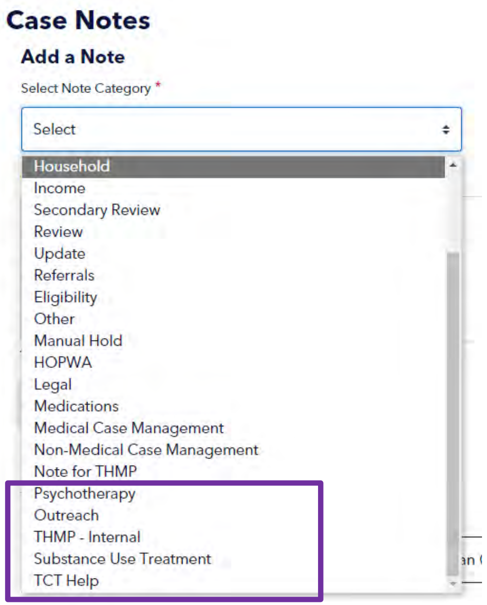
# Feature Updates: Sprint 3

## Additional Case Note Categories




TCT users will be able be to choose new additional case note categories, therefore, providing more flexible case note capacities and discreet categories for users.

Access to edits for the **THMP-Internal case note**, will be available to view to the following user roles:

| Role |
|---|
| ADAP Data ManAdmin |
| ADAP EW (PSI PHPSII) |
| ADAP EW PSIII |
| ADAP Order Processor |

If users are not logged in as one of the above mentioned roles, they will not be able to view the note.

**THMP-Internal:** TCT System will allow THMP users with the ability to share discreet notes amongst select THMP users only, therefore, enhancing and keeping intact client privacy policies.

# Automated Client Merge Process

### Duplicate Client in System

Client is registered in TCT System twice (regardless of the source of client creation – agency portal or client portal)

### TCT Identifies Duplicates

Duplicate entries of clients will be automatically flagged in the TCT System based on ***Client Name, DOB, and SSN / ITIN.***

### Clients with Exact Matches will be Auto-Merged

Clients who have matched 100% will be automatically merged by the system.

### Potential Duplicate Clients are available for Review

Clients who have not matched 100% will be part of the Potential Duplicate Report. DSHS staff / Data Manager will review the report. They will determine if the client is a duplicate by populating the 'Merge Client' column in the UI screen with a Yes / No (*performed within TCT System – UI Screen*)

### Client Merge Report

System will update the Client Merge Report with clients that were successfully merged and clients that failed the automated merge. Error messages will be available for these records so that users may review & resolve.

### Potential Duplicates Approved for Merge will be Merged by System

Clients who were approved for merge on the UI screen will be merged using the pre-defined merge rules.

# Feature Updates: Client Merge

## System Identification of Potential Duplicate Clients

1 Identification of duplicates by the System will be based on the following primary and secondary data elements.

| Primary Data Elements |
|---|
| Client Name |
| Date of Birth |
| SSN or ITIN |

2 If both SSN and ITIN are not present, system will use the secondary data elements to identify potential duplicates instead. Only one of the secondary data elements listed below needs to be identified as a match between clients to consider for a possible merge.

| Secondary Data Elements |
|---|
| Primary Phone |
| Secondary Phone |
| Email |
| Mailing Address |
| Drivers License |
| Physical Address |

**TCT System will automatically identify potential duplicate clients that exist within the system**, therefore, enabling a report to be curated for users to review and take further action to merge if appropriate.

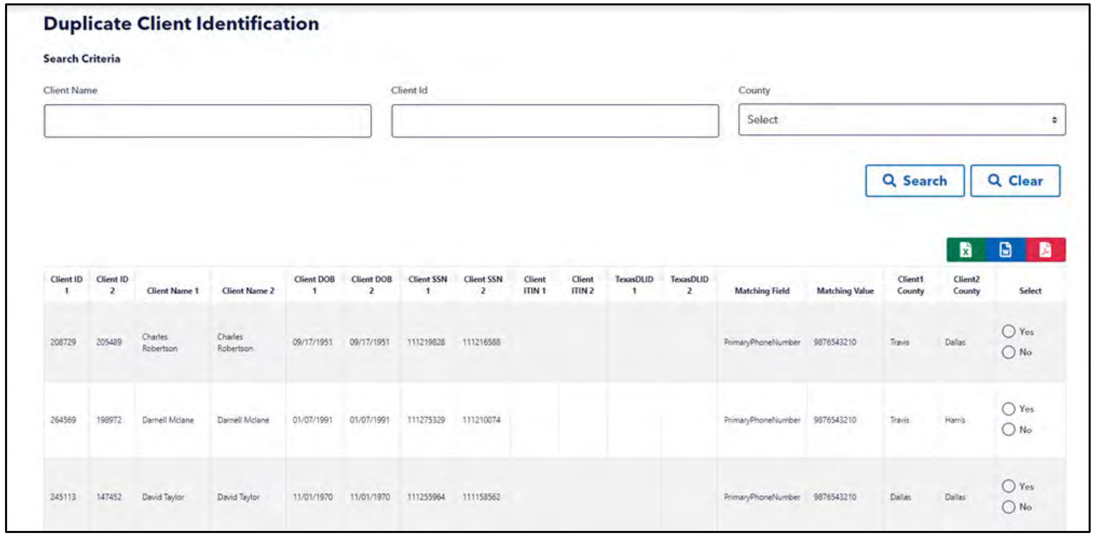
If there is a **100% match based on the primary data elements**, TCT System will process the automatic merge process, without any user intervention.

If **only two of the three primary data elements are a match**, those client records will be part of the **Duplicate Client Identification report**, for users to review and provide merge decisions, as applicable.

# Feature Updates: Client Merge

## Duplicate Client Identification Report




| Client ID 1 | Client ID 2 | Client Name 1 | Client Name 2 | Client DOB 1 | Client DOB 2 | Client SSN 1 | Client SSN 2 | Client ITIN 1 | Client ITIN 2 | TexasDLID 1 | TexasDLID 2 | Matching Field | Matching Value | Client1 County | Client2 County | Select |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 208729 | 205489 | Charles Robertson | Charles Robertson | 09/17/1951 | 09/17/1951 | 111219828 | 111216588 | | | | | PrimaryPhoneNumber | 9876543210 | Travis | Dallas | Yes No |
| 264569 | 198972 | Darnell Mclane | Darnell Mclane | 01/07/1991 | 01/07/1991 | 111275329 | 111210074 | | | | | PrimaryPhoneNumber | 9876543210 | Travis | Harris | Yes No |
| 245113 | 147452 | David Taylor | David Taylor | 11/01/1970 | 11/01/1970 | 111255964 | 111158562 | | | | | PrimaryPhoneNumber | 9876543210 | Dallas | Dallas | Yes No |

TCT users will be able to access a report of potential duplicate clients that exist within the system, therefore, having the capability to review the records and determine if the client records can be merged.

## Client Merge Automation Rules

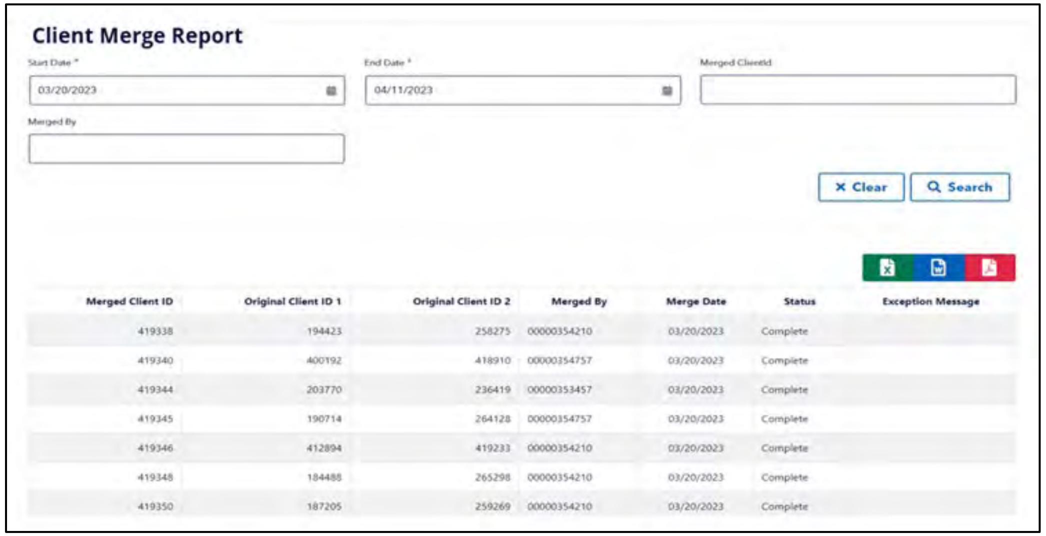
| Sno | Merge Screen Name | Rules |
|---|---|---|
| 1 | Demographics | If one of the clients to be merged is CARE only and other has THMP services, then demographics data from the client that has THMP services takes precedence. |
| | | If both the client IDs being merged have THMP services then pick the data from the latest record.<br>Latest record is defined as the Last Updated date in TCT system.<br>MCI.ClientMaster,<br>DataCollection.Contact tables |
| | | If none of the client IDs being merged have THMP services then the latest records takes precedence.<br>Latest record is defined as the Last Updated date in TCT system |
| 2 | Physical Address | Latest records takes precedence.<br>Latest record is defined as the Last Updated date in TCT system |
| 3 | Other contact info | Selet the information for the client where there is other contact provided. Ignore the record with Null information |
| | | If both of the client IDs being merged have information then select the latest record. |
| 4 | Contact Preference | Select the latest record |
| 5 | Emergency Contact | Select the latest record |
| 7 | Marital Status (Whole section) | Latest Date stamp latest updated into the system |
| 8 | Household Details | Latest information entered into the system |
| | Household Member | Select the data for Household members based on the selection made on the household Details section. Select the household member records corresponding to the household details selection. |
| 9 | Fianancial Information | Select the latest information entered into the system |
| | Client Income Sources | Select the information corresponding to the selection made for financial information section. |
| | Spousal Income | Select the information corresponding to the selection made for financial information section. |
| 10 | Asset and expenses | Select the latest information updated into the system |
| 11 | Basic Medical Info | Select data from a cleint having CARE program . CARE data takes precedence for medical information section.<br>IF there are CARE and THMP programs on two clients to be merged then, CARE data to taken precedence,<br>IF both the clients have CARE program then select the latest record. |
| | CDC Disease Stage | Always select 'HIV Positive' . If one of the record has HIV positive then select "HIV Positive" |
| 12 | Insurance | If Medicare, Medicaid or Medicare Part D then select the latest record.<br>For example if both the clients have Medicaid Part D then select the latest record based on system time stamp.<br>If Client A has Medicare and Medicare Part D and Cleint B has Medicaid. Then select all three records.<br>If Client A has Medicare and Cleint B has Medicare then pick the latest record |
| | | Always use Ramsell ID in case one exists |
| | | For all other insurance types , keeep the both the records and append them. For example if Private Insurance and COBRA record exist then keep both the records.<br>However if both the clients have Private Insurance or COBRA then keep the latest of the two. |
| 13 | Pharmacy | Always select the record with Pharmacy. In case there are no Pharmacys assigned then keep NULL.<br>In case both the clients have Pharmacy then select based on the lates time stamp. |
| 14 | Clients having common Care services and the services eligibility status is NOT Denied | Pick the most recent record. Scenarios listed in Test_Scenarios tab |

The automated client merge process will process as per the pre-defined rules, therefore reducing the need for manual intervention when merging clients.

# Feature Updates: Client Merge

## Client Merge Report



Client Merge Report

Start Date * 03/20/2023

End Date * 04/11/2023

Merged ClientId

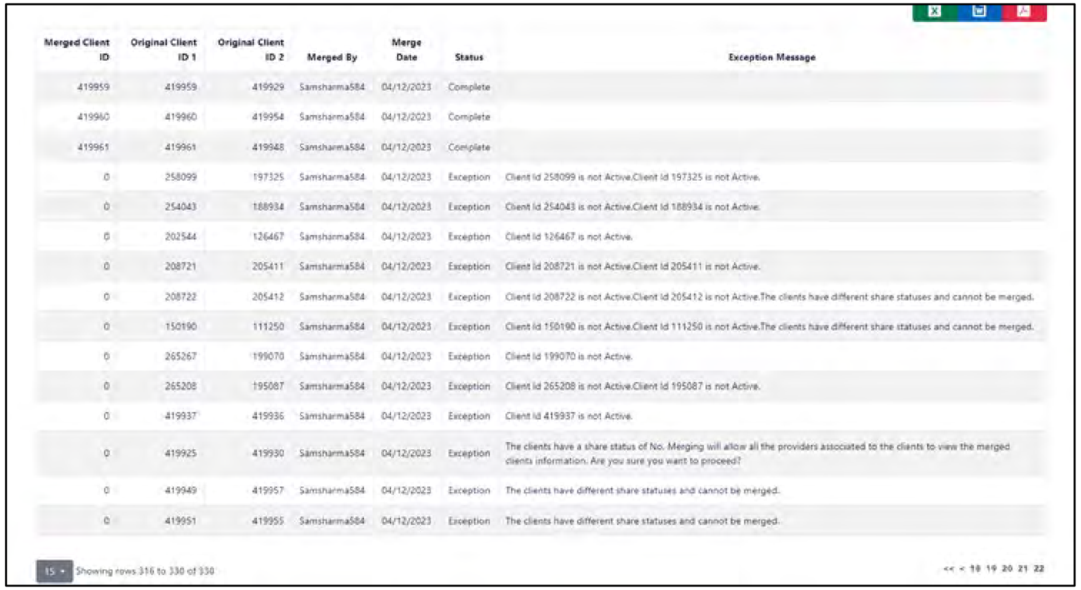
Merged By

✕ Clear | Search

| Merged Client ID | Original Client ID 1 | Original Client ID 2 | Merged By | Merge Date | Status | Exception Message |
|---|---|---|---|---|---|---|
| 419338 | 194423 | 258275 | 00000354210 | 03/20/2023 | Complete | |
| 419340 | 400192 | 418910 | 00000354757 | 03/20/2023 | Complete | |
| 419344 | 203770 | 236419 | 00000353457 | 03/20/2023 | Complete | |
| 419345 | 190714 | 264128 | 00000354757 | 03/20/2023 | Complete | |
| 419346 | 412894 | 419233 | 00000354210 | 03/20/2023 | Complete | |
| 419348 | 184488 | 265298 | 00000354210 | 03/20/2023 | Complete | |
| 419350 | 187205 | 259269 | 00000354210 | 03/20/2023 | Complete | |

TCT Users have access to the number of duplicate clients that were automatically merged by the system or approved for merge by users, therefore ensuring and monitoring data quality.

## Client Merge Report: Exception Messages



| Merged Client ID | Original Client ID 1 | Original Client ID 2 | Merged By | Merge Date | Status | Exception Message |
|---|---|---|---|---|---|---|
| 419959 | 419959 | 419929 | Samsharma584 | 04/12/2023 | Complete | |
| 419960 | 419960 | 419954 | Samsharma584 | 04/12/2023 | Complete | |
| 419961 | 419961 | 419948 | Samsharma584 | 04/12/2023 | Complete | |
| 0 | 258099 | 197325 | Samsharma584 | 04/12/2023 | Exception | Client Id 258099 is not Active.Client Id 197325 is not Active. |
| 0 | 254043 | 188934 | Samsharma584 | 04/12/2023 | Exception | Client Id 254043 is not Active.Client Id 188934 is not Active. |
| 0 | 202544 | 126467 | Samsharma584 | 04/12/2023 | Exception | Client Id 126467 is not Active. |
| 0 | 208721 | 205411 | Samsharma584 | 04/12/2023 | Exception | Client Id 208721 is not Active.Client Id 205411 is not Active. |
| 0 | 208722 | 205412 | Samsharma584 | 04/12/2023 | Exception | Client Id 208722 is not Active.Client Id 205412 is not Active.The clients have different share statuses and cannot be merged. |
| 0 | 150190 | 111250 | Samsharma584 | 04/12/2023 | Exception | Client Id 150190 is not Active.Client Id 111250 is not Active.The clients have different share statuses and cannot be merged. |
| 0 | 265267 | 199070 | Samsharma584 | 04/12/2023 | Exception | Client Id 199070 is not Active. |
| 0 | 265208 | 195087 | Samsharma584 | 04/12/2023 | Exception | Client Id 265208 is not Active.Client Id 195087 is not Active. |
| 0 | 419937 | 419936 | Samsharma584 | 04/12/2023 | Exception | Client Id 419937 is not Active. |
| 0 | 419925 | 419930 | Samsharma584 | 04/12/2023 | Exception | The clients have a share status of No. Merging will allow all the providers associated to the clients to view the merged clients information. Are you sure you want to proceed? |
| 0 | 419949 | 419957 | Samsharma584 | 04/12/2023 | Exception | The clients have different share statuses and cannot be merged. |
| 0 | 419951 | 419955 | Samsharma584 | 04/12/2023 | Exception | The clients have different share statuses and cannot be merged. |

15 Showing rows 316 to 330 of 330

<< < 18 19 20 21 22

TCT Users will be able to view when the automated merge process fails, therefore ensuring client records can be reviewed and verified, to proceed with automated client merge.

# Project Plan: Long-Term

The graphic below represents the features our teams plan to develop throughout the year*.

### PHARMACY PORTAL

Provides Pharmacy users the ability to send THMP medication requests directly to the DSHS Pharmacy warehouse.

### PHARMACY REPORTS

Provides Pharmacy users the ability to view reports on their medication requests sent to the DSHS Pharmacy warehouse.

### CARE PLANS

Allows agency portal users to add service needs to existing CARE plans without a referral.

### CONTRACTS

Update Contracts module to better accommodate the needs of Agencies.

### THMP WORKFLOW

Provides summary of eligibility tasks to help THMP Staff make eligibility determination, and create record of the actions taken for determination.

### WORKER PORTAL ELIGIBILITY

Improves eligibility rules and eligibility periods for worker efficiency.

### AGENCY CLIENT PAGES

Allows agency portal users ability to better view and update client information.

### CASE INTAKE

Allows creation of an Insurance History page & improve related individuals information.

### ASSESSMENT WORKFLOWS

Adding risk factors for related individuals, and linking information on TCT program on the Dashboard.

### MONKEYPOX

Updates to Monkeypox Immunization & Special Designation reports.

### SHARE STATUS

Allows updating client's Share Status, such as updating the value from 'No' to 'Yes'.

### APPLICATION WORKFLOW

Allows updates such as requiring agency selection on the application.

### INSURANCE VERIFICATION

Allows an Interfaces with THMP vendor insurance data to allow TCT to reflect the health insurance information.

### REPORTS

Allows creation of new reports and updates to existing reports.

*This project plan is subject to change as priorities may change.*

Completed    Ongoing (Sprint 4)    Upcoming