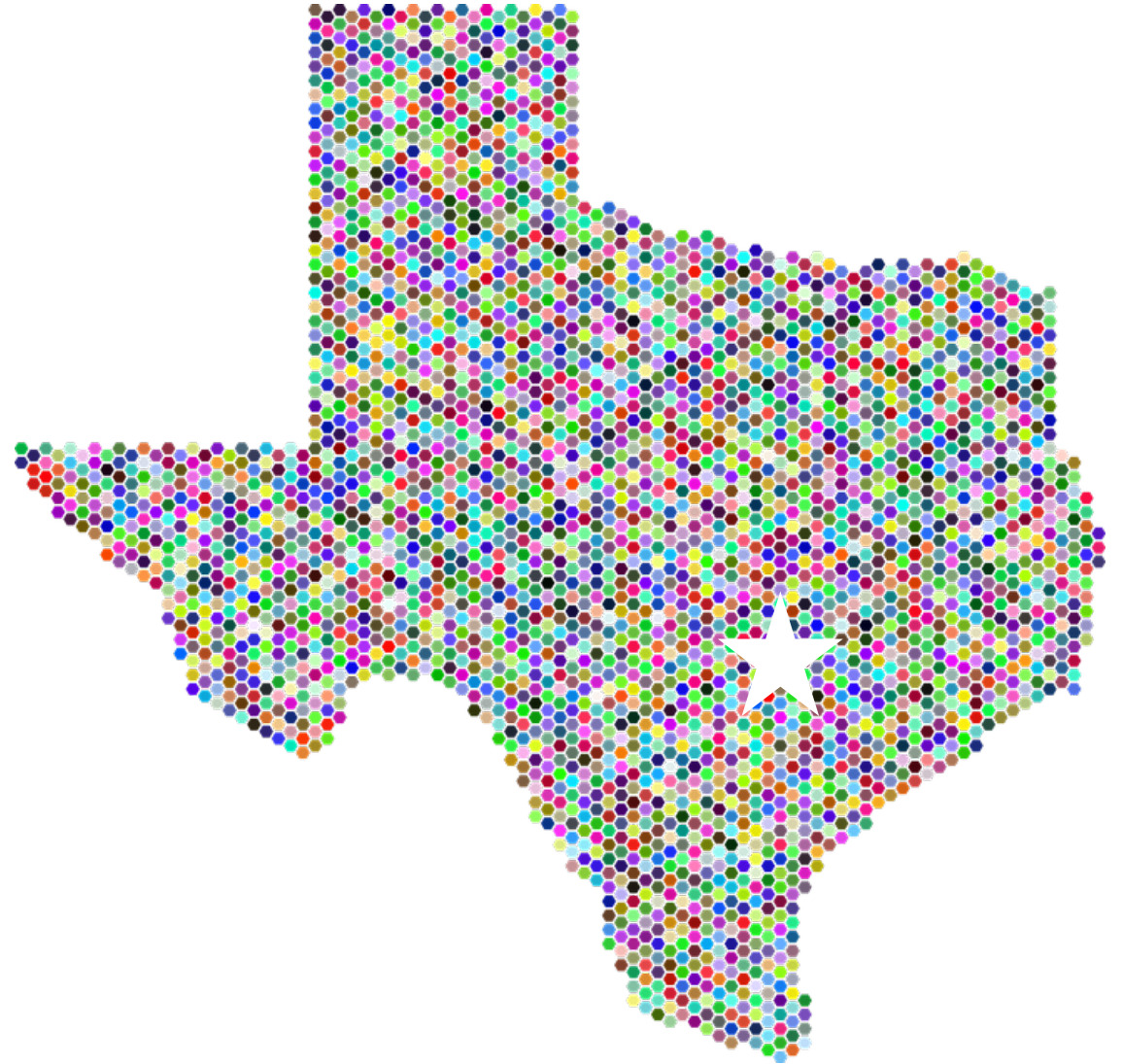# Take Charge Texas (TCT)
User Engagement Session

October 19th, 2023

Meet the Facilitators

DSHS/HHSC TEAM

Charletha Joseph
Program Support

Rachel Sanor
THMP Director

Christine Salinas
ADAP Manager

Holly Benavides
TCT Help Desk Manager

Ramani Siddharthan
TCT Help Desk
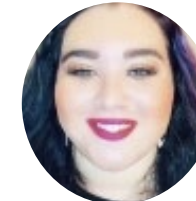
Ethel Garcia
Medication Data and Analysis
Group Manager

DELOITTE TEAM

Nikki Fernandes
Project Manager

Meeta Sharma
Test Lead

Hunter Chernyha
Team Lead/Scrum Master

Krishna Dixit
Consultant/Discovery

Caleb Fingel
Analyst/Discovery

2 |

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
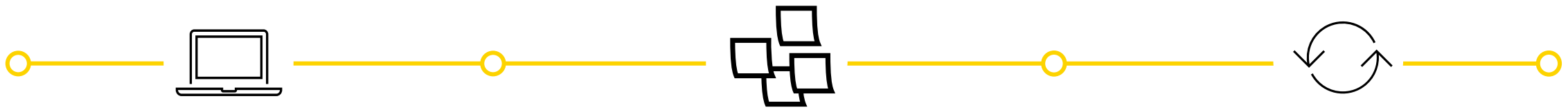
What do you hope to learn through this session?

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.

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	**SPRINT 6**	**SPRINT 7**	**SPRINT 8**	**SPRINT 9**
Focused on the establishment of pharmacy site creation as well as pharmacy order creations. Provided additional features in maintaining client status activities	Focused on creating Pharmacy reports as well as notification letters for Pharmacy related updates on Client profiles. Provides additional immunization report capabilities.	Focused on the application workflow enhancements as well as client merge/linking history. Provided improvements to Task Board for processing applications effectively.	Focused on enhancements of Agency Portal Client Pages and updates to Client Merge process. Provided enhancements to Eligibility and Client Import process.	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.

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

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

Project Plan: In Progress Features

The graphic below represents the features & user stories our team is currently consuming for Sprint 8.

Jan '23

We are here

Sprint 10

Jan '24

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

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

Project Plan: Upcoming Features

The user stories below indicate all Highest & High priority stories in the backlog.

*

Sprint 11 10/30 – 11/24	Sprint 12 11/27 – 12/22	Sprint 13 1/2 – 1/26
● ★ **Agency Portal Client Pages**	◆ **Reports**	◆ **Reports**
★ **Pharmacy Portal**		
● **Application Workflow**		
★ **Pharmacy Reports**		
● **Client Portal**		

Key

★ THMP

◆ CARE

● General

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

Poll Everywhere

Poll Everywhere

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

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

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

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

System Overview: **New** TCT Features

Live Demonstration of TCT Features

TCT Features Video Presentation

- 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 – 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

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.

Our team will host the **next TCT User Engagement session** on Thursday, November 16th.

Thank You!

System Overview: **New** TCT Features

Feature Updates: Sprint 9

Masking SSN on Client Search and Client Details Screens

Client Search Screen

- *The first image displays the results when a User searches by any of the search criteria on the screen, the results table will mask the first 5 digits and only display the last 4 digits of a record's Social Security Number (SSN) in the SSN/ITIN column, with an eye icon to unmask if the User prefers to view the full value.*
- *The second image displays a Userr searching by entering in the full Social Security Number, and will have an eye button to unmask if the User prefers to view it. When a User is typing in the values, it will be completely masked with dots. This will happen immediately upon typing values into the field.*

Create New Client Screen

- *On this screen, when a user is typing in the values for Social Security Number (SSN) field, it will be completely masked with dots, with an eye button to unmask if the User prefers to view it.*

Client Details Screen

- *On this screen, the Social Security Number (SSN) field will be completely masked with dots, with an eye button to unmask if the User prefers to view it.*
- *This will also be applicable when a User creates a new client in TCT Portal through the Create New Client Import (.xml file).*

TCT Users will have the ability to view the Social Security Number (SSN) as masked on Client Search, New Client, and Edit Profile screens, so that client data security and client privacy is intact.

Feature Updates: Sprint 9

Display Order Created By on Order Dashboard

Pharmacists can view and edit Open (Started) and Open (Empty) orders that were created by another user associated with their pharmacy

THMP Admins and ADAP Order Processors can view and edit Open (Started) and Open (Empty) orders that were created by another user for all pharmacies
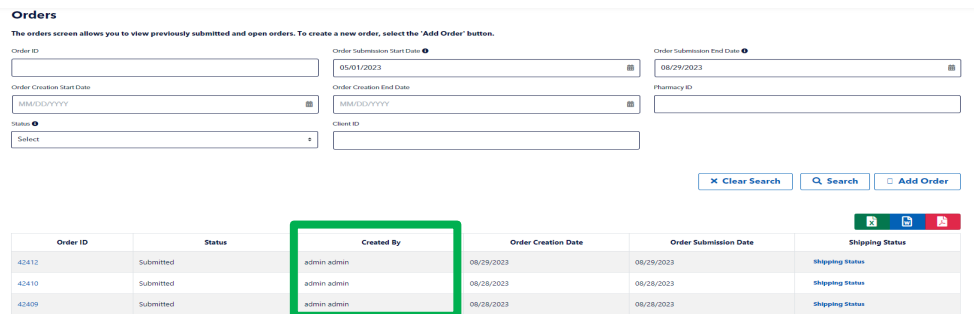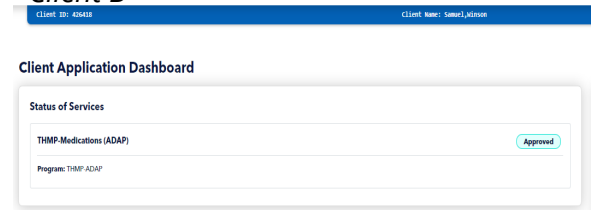

TCT Users will be able to identify the creator of an order on the Order Dashboard so that they are unable to make updates to another user's order unless necessary.

Merging Eligibility Records by Eligibility Decision Date for Clients with the Same Subprogram
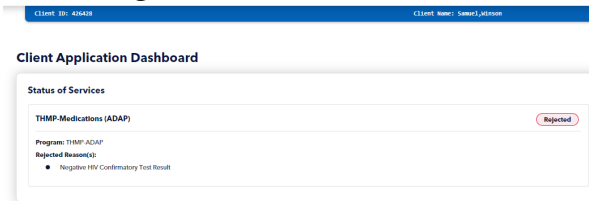
Client A
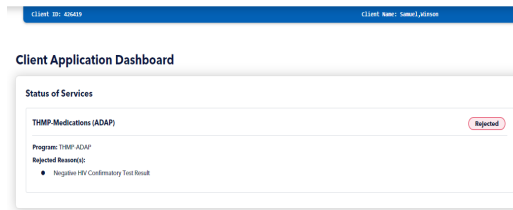
Client B

New Merged Client

When merging with the same THMP or CARE subprograms, the eligibility record with the most recent Eligibility Decision Date (regardless of Eligibility Status) will be retained for the new merged Client ID.

When clients are being merged with the same THMP or CARE subprograms, the eligibility record with the most recent Eligibility Decision Date (regardless of Eligibility Status) will be persisted on the new merged Client ID.

TCT users will be able to view the system selecting the latest eligibility record regardless of Eligibility Status when merging clients with the same THMP or CARE subprograms, so that the new Client ID will reflect the latest eligibility record.
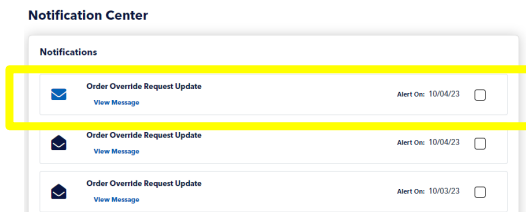
Feature Updates: Sprint 9

Notification for Order Override Denials for Pharmacist

From: HRAR.Services@hhs.texas.gov <HRAR.Services@hhs.texas.gov>
Sent: Friday, October 6, 2023 4:48 PM
To:
Subject: Order Override Request Update

There is an update to the medication you ordered for your client for Order ID 2469. Your Order ID 2469 has been denied for the below medication. Please login to https://sit1.ap.dshs.texas.gov to view the further details.

• ACYCLOVIR(Acyclovir)

Notification Center

Notifications

✉ Order Override Request Update	Alert On: 10/04/23	☐
View Message		
✉ Order Override Request Update	Alert On: 10/04/23	☐
View Message		
✉ Order Override Request Update	Alert On: 10/03/23	☐
View Message		

Order of ACYCLOVIR OS(Acyclovir) medication for client 426386 was denied in Order ID 42457.

Close

The following scenarios will trigger a notification (both in the Notification screen and an email notification) to be created for the User who submitted the override request:

- *A THMP Admin or ADAP Order Processor clicks on Deny on the Order Overrides screen.*

- *Upon the above action, the notification (both in the Notification screen and an email notification) will be triggered in real time.*
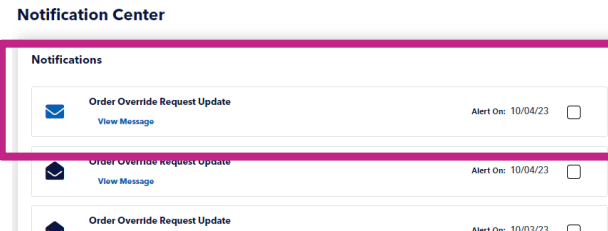
TCT users will be able to receive notifications for medication orders that they submitted, which have been denied in the order override request process, so that they can track orders efficiently.

Notification for Order Override Approvals for Pharmacist

From: HRAR.Services@hhs.texas.gov <HRAR.Services@hhs.texas.gov>
Sent: Monday, October 9, 2023 2:58 PM
To:
Subject: Order Override Request Update

There is an update to the medication you ordered for your client for Order ID 42541. Your Order ID 42541 has been approved for the below medications. Please login to https://uatap.tct.dshs.texas.gov/ to view the further details.

• ACYCLOVIR (100/btl)(Acyclovir)

Notification Center

Notifications

✉ Order Override Request Update	Alert On: 10/04/23	☐
View Message		
✉ Order Override Request Update	Alert On: 10/04/23	☐
View Message		
Order Override Request Update	Alert On: 10/03/23	☐

Order of EVOTAZ (30/btl)(Evotaz (atazanavir/cobicistat)) medication for client 426388 was approved in Order ID 42491.

Close

The following scenarios will trigger a notification (both in the Notification screen and an email notification) to be created for the User who submitted the override request:

- *A THMP Admin or ADAP Order Processor clicks on Deny on the Order Overrides screen.*

- *Upon the above action, the notification (both in the Notification screen and an email notification) will be triggered in real time.*

Update: TCT User will be able to receive notifications for medication orders that they submitted, which have been approved in the order override request process, so that they can track orders efficiently.

Feature Updates: Sprint 9

Pharmacy Notes on Pharmacy Details Screen

This section will be accessible for view and edits to the following user roles: HRAR Admin, ADAP Data ManAdmin, ADAP Order Processor
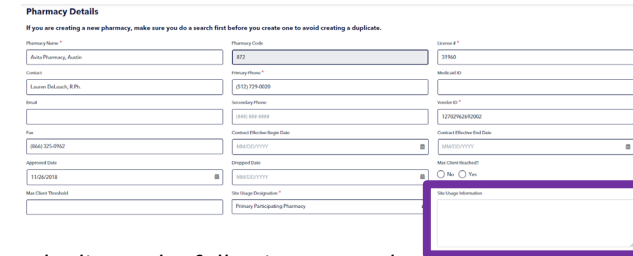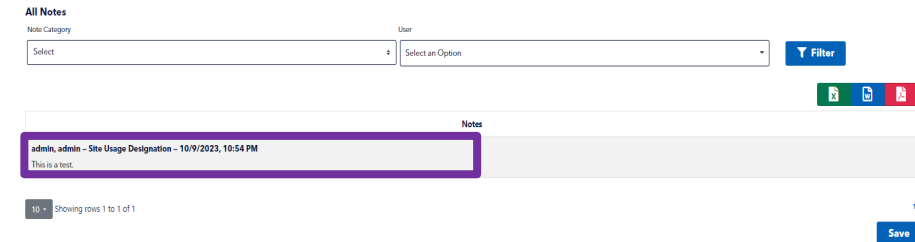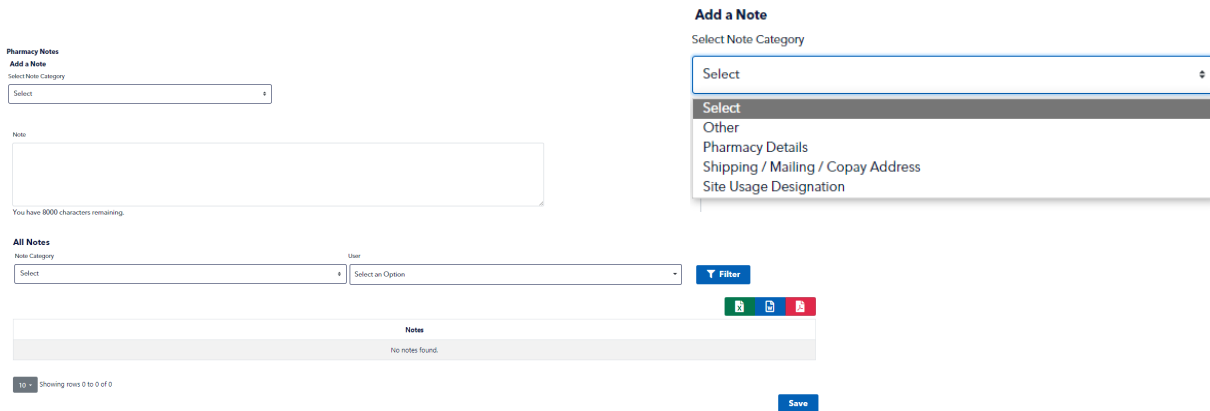
Adding Pharmacy Notes

This section will be accessible for view and edits to the following user roles:

- *HRAR Admin*
- *ADAP Data ManAdmin*
- *ADAP Order Processor*

Once a note has been added, the notes will display in a table format beneath the fields above in a section titled 'All Notes'.

All Users on the Role to Screen Mapping screen with Read access to the Pharmacy Details screen will only be able to view the notes, not filter and search the notes. All Users on the Role to Screen Mapping screen with Read/Write access to the Pharmacy Details screen will be able to view the notes and filter and search the notes.

TCT Users will be able to add notes on the Pharmacy Details page, so that they can add any pertinent information as needed.

Feature Updates: Sprint 9

HAB Report - Multiple Agency Selection

Users can now select multiple agencies in this field however, if 4800 - Texas Department of State Health Services is selected, users will not be able to select any other agency.

When a user selects multiple agencies in the 'Agency or Agencies' search field, the following fields will function as follows:
- *Funding Source(s)*
  - *All funding sources associated with the agencies selected will display for selection*
- *Contract(s)*
  - *All contracts associated with the agencies selected will display for selection*
- *Service(s)*
  - *All services associated with the agencies selected will display for selection*

TCT Users will now have the ability to select multiple agencies on the HAB report, so that it is easier to compare data across agencies.

Addition of TX Department of State Health Services on the HAB Report

Rename 'Agency or Administrative Agency' search field as 'Agency or Agencies'
Rename 'Funding Source' search field as 'Funding Source(s)'
>*When a User selects '4800 - Texas Department of State Health Services' in the 'Agency or Agenc[ies]' field, this will display all funding sources in TCT Portal as well the option to select 'All'*
Rename 'Contract' search field as 'Contract(s)'
>*This field will be disabled only when '4800 - Texas Department of State Health Services' is selected.*
Rename 'Primary Service' search field as 'Services(s)'
>*When a User selects '4800 - Texas Department of State Health Services' in the 'Agency or Agencies' field, this will display all services in TCT Portal as well the option to select 'All'*

TCT users will be able to generate the HAB report for the entire state of Texas, so that they can assess the overall performance measures for the state.

Feature Updates: Sprint 9

Generating Pharmacy Copy Letters Based on Latest Transaction

The following pharmacy copy letters will be impacted with this feature:

• *Client/Pharmacy Update Letter Pharmacy Copy*

•*New Client Letter Pharmacy Copy*

•*Client/Pharmacy Update Letter Pharmacy Copy (Secondary Sites)*

•*New Client Letter Pharmacy Copy (Secondary Sites)*

Client/Pharmacy Update Letter Pharmacy Copy

TCT users will be able to view the Pharmacy Copy letters generation based on the latest transaction, so that multiple letters for one client don't print for a pharmacy within a single day, hence triggering only one letter to be generated for that pharmacy in one day.

Feature Updates: Sprint 9

Update Services Import XML Process to Include AIDN

The Services Import XML file will be updated to include the following fields:

- *'Agency Assigned ID Number (AIDN)'*

  - *Optional field; If an Agency Assigned ID Number is provided on the file, the Client ID will no longer be a required field*

  - *Otherwise, the Client ID will remain mandatory*

When a Services Import XML file is uploaded into TCT and the Agency Assigned ID Number was provided on the file but the Client ID was not provided, the file will result in an exception and the following validation will display:

- *'When a client ID is not provided, the AIDN, Organization ID, First Name, Last Name, Date of Birth, and Gender must be provided in the file and result in an exact match with an existing client's data in TCT. An exact match was not found so the client's service records could not be updated in TCT."*

System will check the below data on the file and attempt to find an exact match on the data for an existing client in TCT: Agency Assigned ID Number (AIDN), Organization ID, First Name, Last Name, Date of Birth, Gender

An exact match must be made on all six data elements above in order to successfully update the client's services data in TCT

- *If an exact match was found with a client in TCT, the client's services data will be successfully updated in TCT.*
- *If an exact match was found with more than one client in TCT, the file will result in an exception and the following validation will display:*
  - *The AIDN, Organization ID, First Name, Last Name, Date of Birth, and Gender provided in the file matched with multiple clients in TCT so the client's service records could not be updated in TCT.*

Upload Success

Upload Failure

TCT users will be able to view the Agency Assigned ID Number field when importing the Services Import XML file so that services information can be mapped to the applicable client in the TCT Portal without needing to provide the TCT Client ID.

Feature Updates: Sprint 9

Update Medical Import XML Process to Include AIDN

The Medical Import XML file will be updated to include the following fields:

- *Agency Assigned ID Number (AIDN)'*

  - *Optional field*

  - *If a value is provided in this field, the Organization ID is a required field.*

System will check the below data on the file and attempt to find an exact match on the data for an existing client in TCT: Agency Assigned ID Number (AIDN), Organization ID, First Name ,Last Name, Date of Birth, Gender

An exact match must be made on all six data elements above in order to successfully update the client's medical data in TCT

- *If an exact match was found with a client in TCT, the client's medical data will be successfully updated in TCT.*
- *If an exact match was found with more than one client in TCT, the file will result in an exception and the following validation will display:*
  - *The AIDN, Organization ID, First Name, Last Name, Date of Birth, and Gender provided in the file matched with multiple clients in TCT so the client's medical records could not be updated in TCT.*

When a Services Import XML file is uploaded into TCT and the Agency Assigned ID Number was provided on the file but the Client ID was not provided, the file will result in an exception and the following validation will display:
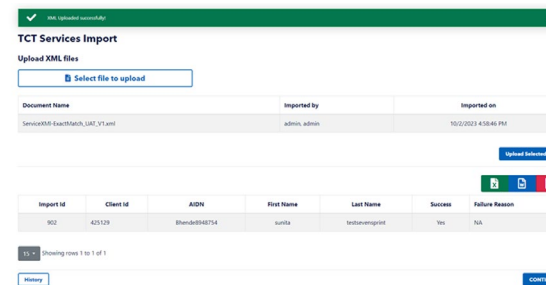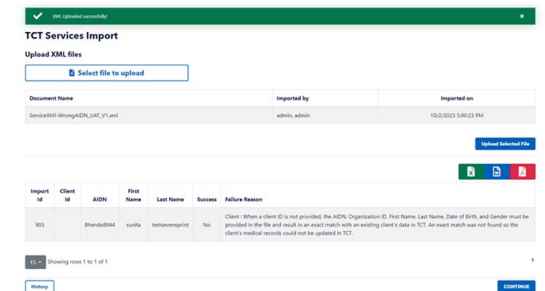
- *'When a client ID is not provided, the AIDN, Organization ID, First Name, Last Name, Date of Birth, and Gender must be provided in the file and result in an exact match with an existing client's data in TCT. An exact match was not found so the client's medical records could not be updated in TCT."*

Upload Success

Upload Failure

TCT users will be able view the Agency Assigned ID Number when importing the Medical Import XML file so that medical information can be mapped to the applicable client in the TCT Portal without needing to provide the TCT Client ID.