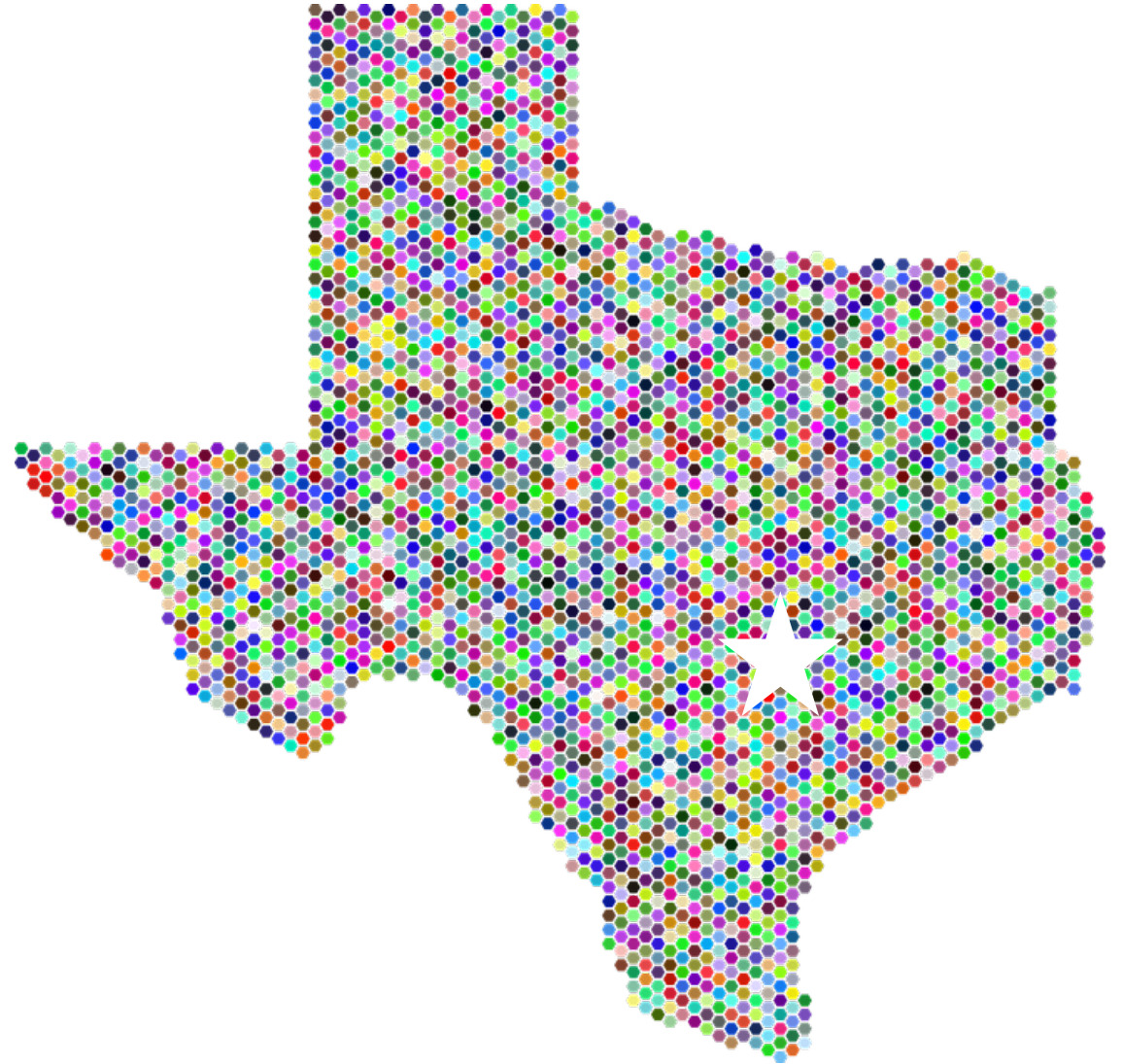


Take Charge Texas (TCT) User Engagement Session

August 24th , 2023



Meet the Facilitators

DSHS/HHSC TEAM



Charletha Joseph
Program Support



Rachel Sanor
THMP Director



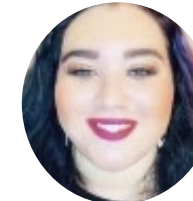
Christine Salinas
ADAP Manager



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

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:

PolIEV.com/tctdshsstaff

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

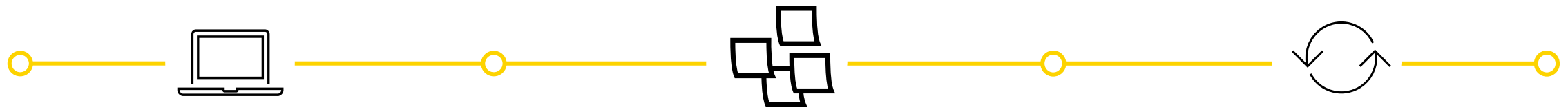
PolIEV.com/tctnondshsstaff

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 THMP Eligibility



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.

User Stories

Sprint 1

- Client Import into TCT & New Client Creation
- TCT Client Import – Successful Creation
- TCT Client Import – Failed Creation
- Adding EUCL 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

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

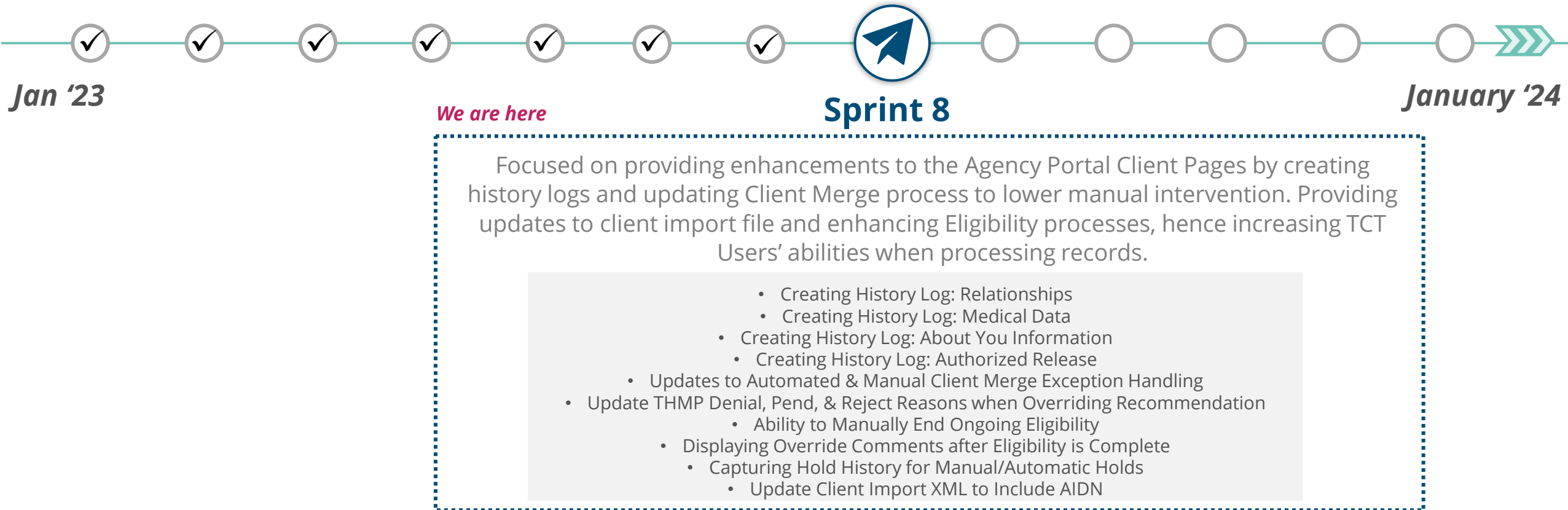
- Shingrix Vaccine Enhancements
- Exclude ADAP Clients on Hold From the Clients Coming Up For Renewal Report
- Update Client Letter Templates
- Monthly Pharmacy Orders Report
- Generating Letters by Client ID
- Update Letter Triggering Conditions
- Client/Pharmacy Update Letter Pharmacy Copy
- Client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






















Project Plan: In Progress Features



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



Project Plan: Upcoming Features

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

<p>Sprint 9 9/4 - 9/29</p> <ul style="list-style-type: none">   Application Workflow  Worker Portal   Reports  Pharmacy Portal  Client Search 	<p>Sprint 10 10/2 - 10/27</p> <ul style="list-style-type: none">  Share Status  Interfaces  New Client  Eligibility 	<p>Sprint 11 10/30 - 11/24</p> <ul style="list-style-type: none">   Agency Portal Client Pages  CARE Plans  Contracts  Create & Manage Account  Client Search
<p>Sprint 12 11/27 - 12/22</p> <ul style="list-style-type: none">  Reports 	<p>Sprint 13 1/2 - 1/26</p> <ul style="list-style-type: none">    Reports 	

	THMP
	CARE
	General

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

Poll Everywhere

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PolIEV.com/tctdshsstaff

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

- [Update Hyperlink in Client Portal](#)
- [Expand Provider Agencies for Selection on Application Workflow](#)
- [Combine Household Details Questions on Clients' Relationship Pages](#)
- [Task Board Bulk Assignment & Display Only Active Provider Agencies](#)
- [Display Master Client ID in Edit Client Profile Screen & Merge/Linking History](#)
- [Update Mpox Language in TCT](#)
- [Pharmacy Cover Letter Updates](#)
- [Task Board – Displaying Reason for Emergency Applications](#)
- [Remove THMP Region from User Scope Assignment](#)



Gathering Your Feedback



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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, September 21st.

Thank You!

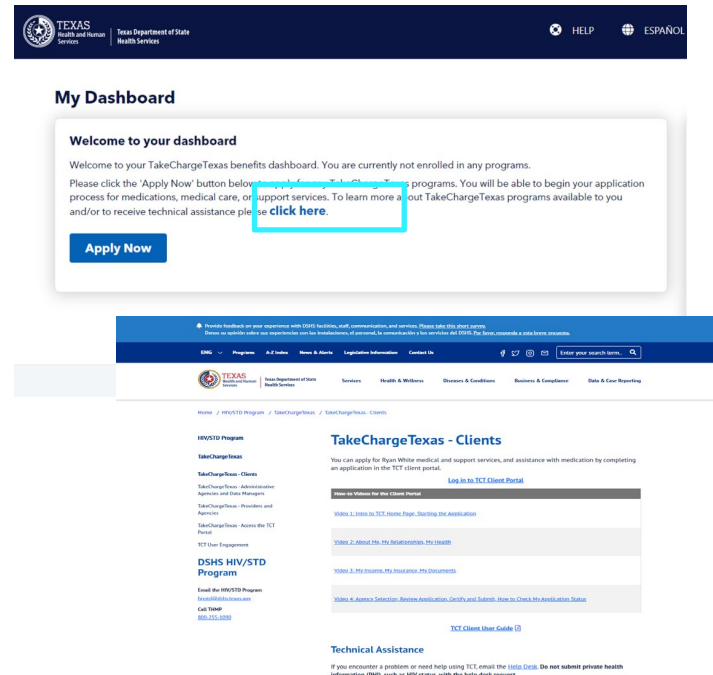
System Overview: **New** TCT Features



Feature Updates: Sprint 7

Update Hyperlink in Client Portal

TCT Clients will now be able to click on the 'Click Here' hyperlink.



Once the 'Click Here' hyperlink is clicked, Client will be navigated to the Help Center site, where they will have access to useful and helpful resources

TCT Clients will have the ability to click on the hyperlink provided on the Client Portal and be directed to the Help Center for additional helpful resources.

Expand Provider Agencies for Selection on Application Workflow

On both Agency Portal and Client Portal, the Agency Selection screen of the application process will have the following fields displayed:



- County – this is a dropdown field
- Zip Code – this is a freeform text field
- Clear button
- Search button

When a User is on the Agency Selection page of the application workflow, the list of provider agencies that will display will be defaulted to provider agencies that share the same County as the client's Physical Address County.

If no provider agencies exist within TCT that match the county of the client's Physical Address or Mailing Address, system will not pre-populate the County field and will instead display all active provider agencies (associated with all counties) for selection.

Users have the ability search for additional agencies by the County and/or Zip Code fields.

TCT Users will be able to select a provider agency which may be located in a different county from the Client, hence providing liberty to select from a larger list of agencies.

Feature Updates: Sprint 7

Combine Household Details Question on Clients' Relationship Pages

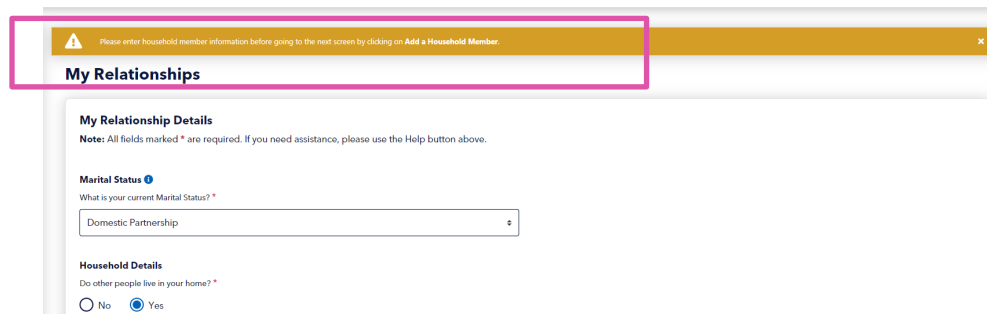
The following questions will be combined into a new question:

Prior Questions:

- 'How many people under age 18, including the Client, live in their home?'
- 'How many of the Client's own children or stepchildren live in the home?'

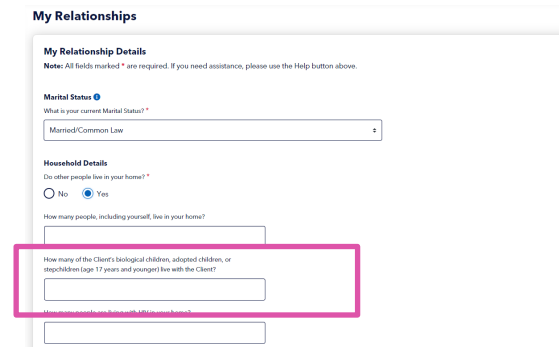
New Question:

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

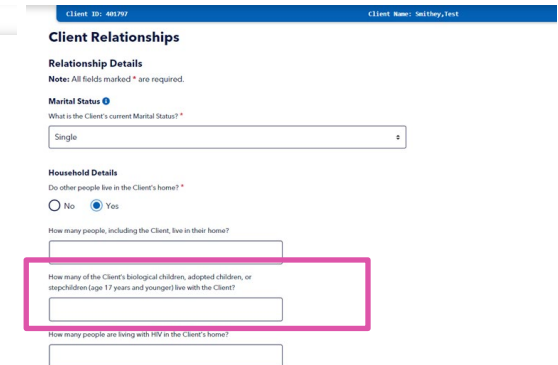


The new question will be populated in both the Application workflow as well the Client Dashboard for both Agency and Client dashboard.

Relationships screen on the Application workflow:



Relationships screen on the Client dashboard:



In both the client portal and agency portal on the Relationships page of the application workflow, when a user selects 'Yes' to 'Do other people live in the Client's home?' but does not add a Household Member for the client, the message (image on the left) will be presented to the user.

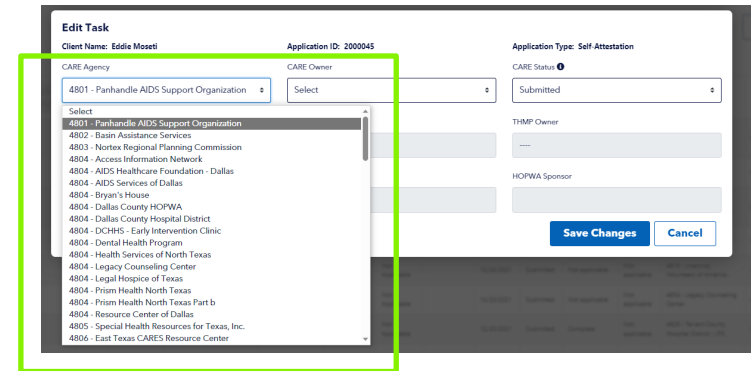
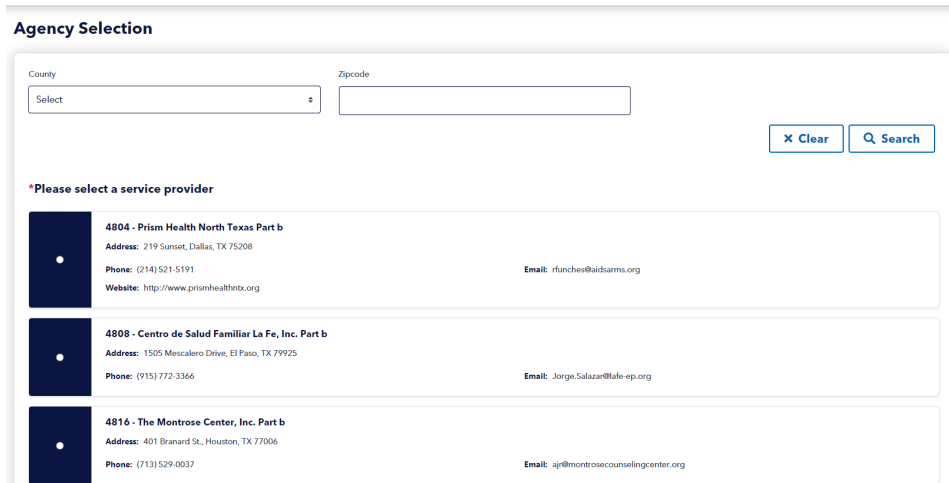
This message is a validation and does not prohibit the User with proceeding forward with the application. Users will be able to proceed forward with the application workflow.

TCT users will be able to view clarified questions on the Relationships page of the application workflow and Relationships page of the client dashboard to be able to gather data accurately. This is applicable to both Agency and Client Portal.

Feature Updates: Sprint 7

Display Only Active Provider Agencies on Agency Selection Screen & Task Board

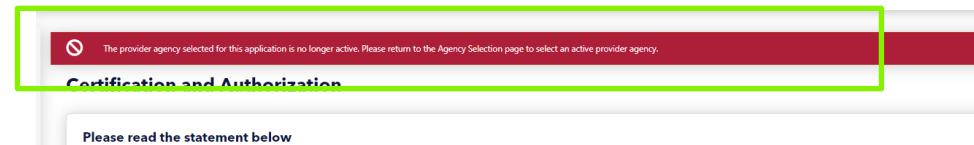
Users will be able to view and select only Active agencies on the Agency Selection page of the application workflow on both the Agency and Client Portals.



On the Agency Portal Task Board screen, only Active agencies will be displayed for selection in the CARE Agency field of the 'Edit Task' pop-up.

If a provider agency is updated from 'Active' to 'Inactive' or 'Deactivated', it will not appear for selection on the 'Agency Selection' page of the application workflow or in the 'CARE Agency' field on the 'Edit Task' pop-up on the Task Board.

For **applications in progress** (not yet submitted), if the provider agency that was selected on the 'Agency Selection' page of the application workflow becomes Inactive or Deactivated before the application is submitted, users will have a message on the Certification and Authorization screen notifying them that the Agency selected is no longer active.

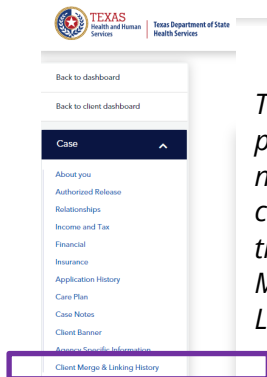


TCT Users will be able to view Active agencies on the Agency Selection page of the application workflow and on the Edit Task Feature on the Task Board, hence providing applications/clients to be associated with Active agencies only.

Feature Updates: Sprint 7

Display Master Client ID in Edit Client Profile Screen & Merge/Linking History

There is new field under the First Name field on the Client Details page, titled 'Client ID' when a User selects Edit Client Profile from the Client's dashboard.



There is a new page on the left navigation of a client's profile, titled 'Client Merge & Linking History'.

Client Merge & Linking History
Client ID : 420524

Action	Merged Client ID	Unmerged Client ID	Client ID 1	Client ID 2	Linked To	Unlinked From	Action By	TAMI ID	ARIES ID	Date
Merge	420234	420241	420171	420172			seth@astoria	8276	10210203	06/10/2023 9:46:17 AM
Merge	420241	420191	13771				seth@astoria	8276	10210203	04/21/23

The 'Client Merge & Linking History' page will present the history by showing the Action (can be Merged, Unmerged, Linked or Unlinked), the Merged Client ID, Unmerged Client ID, Client ID 1, Client ID 2, Linked To, Unlinked From, Action By, TAMI ID, ARIES ID, and Date.

TCT User will be able to view the most recent Client ID, in addition to a history of any prior client IDs for clients, hence providing information on past updates on that particular client ID.

Update Mpox Language in TCT

'Monkeypox' has been updated to 'Mpox' in the following locations:

Special Designation Report

Client Services page on the Client Dashboard: When a User selects Add Service, the Add Client Service Detail Record:

STI/HEP page on the Client Dashboard

Laboratory Test Results
STI/HEP Details

Test Type	Test	STI/HEP Test Date	STI/HEP Test Result	Lab Value	Treatment Indicated	Treatment Received for Mpox	Treatment Type	Actions
Mpox	Genital Herpes	07/18/2023	Detected	0	No	Mpox		Edit Delete
Orphan	COVID-19 Antibody Test	07/18/2023	Equivalent	0	--	Mpox		Edit Delete
Other Mpox Test	COVID-19 Antibody Test	07/18/2023	Detected	0	--	Mpox	Callous	Edit Delete

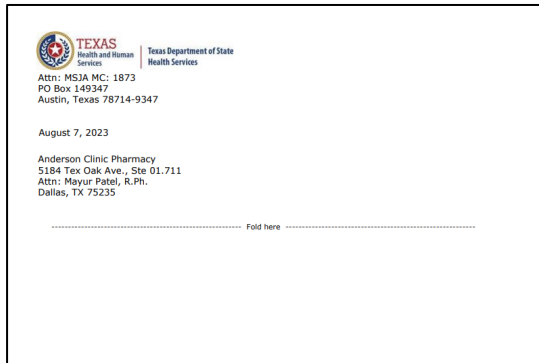
TCT users will be able to view updated language in the TCT Portal, from Monkeypox to Mpox. This will ensure alignment of language utilized for Mpox in accordance with regulations.

Feature Updates: Sprint 7

Pharmacy Cover Letter Updates

The following Pharmacy Letters will now generate only one cover letter for a single pharmacy on a single day, even when there are multiple letters generated for different clients assigned to the pharmacy.

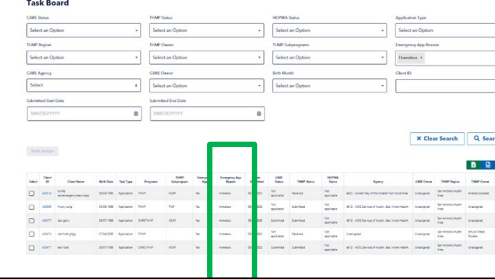
- New Client Letter Pharmacy Copy
- Client/Pharmacy Update Letter Pharmacy Copy
- New Client Letter Pharmacy Copy (Secondary Sites)
- Client/Pharmacy Update Letter Pharmacy Copy (Secondary Sites)



TCT Pharmacies will now have one cover letter generated within a single day, hence ensuring numerous cover letters are not generated for one particular pharmacy.

Task Board – Displaying Reason for Emergency Applications

On the Task Board, there is a new column, titled 'Emergency App Reason', next to the 'Emergency App' column. Users can utilize this field to search for specific Emergency App Reason applications. The 'Emergency App Reason' column will be populated only when 'Emergency App' is 'Yes'.



If a client answers 'Yes' to more than one question in the tables below, the value in the Display Priority column is determining the Emergency App Reason that will display on the Task Board.

Questions in Application Workflow	Emergency App Reason	Display Priority
If Yes is selected for "Have you been recently incarcerated (in the last 6 months)?"	Incarcerated	1
If Yes is selected for "Do you have COBRA or lost my Employer Health Insurance and are interested in COBRA?"	COBRA	2
If Yes is selected for "Is your CD4 count below 100?"	CD4 Count < 100	3
If Yes is selected for "Are you pregnant?"	Pregnant	4
If Yes is selected for "Have you been out of care for more than 6 months?"	Out of Care > 6 months	5
If Yes is selected for "Are you experiencing homelessness?"	Homeless	6
If Yes is selected for "Are you under 24 years old?"	Under 24yrs age	7

TCT users will be able to view the reason for an emergency application on the Task Board, hence ensuring applications can be reviewed in a timely manner.

Feature Updates: Sprint 7

Performing Bulk Edits on the Task Board: THMP Owner & CARE Owner

The following new filters have been added to the Task Board:

THMP Owner, CARE Owner, CARE Agency

Bulk Assignment Feature

Only the below user roles have the ability to bulk edit the fields below:

THMP Owner: ADAP EW PSI PHPSII, ADAP EW PSIII, ADAP EW PSIV PSV, ADAP Data ManAdmin, HRAR Admin

CARE Agency & CARE Owner: AA Data Manager, HRAR Admin

Users will be able to select up to 20 tasks at a time for bulk edit on the Task Board.

- For CARE tasks, only clients that have a Share Status of Yes will be available for bulk editing.
- CARE only applications with a Share Status of No will not be available for bulk edits - it will only be available for single record update.

TCT users will be able to select multiple tasks on the Task Board to assign to THMP Owners and CARE Owners in bulk, hence ensuring an efficient workflow process in task management.

Once a User begins to select the checkbox(es), the 'Bulk Assign' will become clickable and after selecting the preferred records, User can click on the Bulk Assign button.

Select	Client ID	Client Name	Birth Date	Task Type	Program	THMP Subprogram	Emergency App	Emergency App Reason	Date Submitted	CARE Status	THMP Status	HOPWA Status	Agency	CARE Owner	THMP Region	THMP Owner	Actions
<input checked="" type="checkbox"/>	144462	Isabel Guerra	09/20/1995	Self-Attestation	CARE/THMP		Not Applicable		12/20/2021	Received	Complete	Not applicable	Unassigned	Unassigned	San Antonio/Health Area	admin.admin1	Edit
<input checked="" type="checkbox"/>	41205	Alejandro Reyes	05/11/1972	Reassignment	CARE		Not Applicable		12/20/2021	Received	Not applicable	Not applicable	Unassigned	Unassigned	Not applicable	Unassigned	Edit
<input checked="" type="checkbox"/>	402771	Angel Martinez	12/05/1958	Self-Attestation	CARE/THMP		Not Applicable		12/20/2021	Submitted	Complete	Not applicable	4818 - Bear County University Health System	Unassigned	San Antonio/Health Area	Unassigned	Edit
<input checked="" type="checkbox"/>	244727	Yvonna Elton	04/05/1976	Application	CARE/THMP	ADAP	No		12/20/2021	Submitted	Complete	Not applicable	4824 - Delta County Hospital District	Unassigned	Delta/PL Health Area	Unassigned	Edit
<input checked="" type="checkbox"/>	401750	SARAH JOHNSON	07/02/1989	Self-Attestation	CARE	ADAP	Not Applicable		12/20/2021	Submitted	Not applicable	Not applicable	4816 - Inetech/Volunteers of America	Unassigned	Not applicable	Unassigned	Edit

When a User selects the Bulk Assign button, a pop-up will appear to proceed with the bulk assignment.

Select users can select the THMP Owner, which will bulk assign all the selected THMP and CARE/THMP tasks. Select users can select a CARE Agency which will trigger the population of the options in the CARE Owner dropdown field, and select the owner of the CARE and CARE/THMP tasks.

Users can remove specific tasks if they wish to remove them from bulk assignment.

Feature Updates: Sprint 7

Remove THMP Region from User Scope Assignment

On the User Scope Assignment page, 'THMP Region' will be removed so Users are not able to select that.

User Scope Assignment

User Id ⓘ
Select UserId/LoginId
p0000360056 x -

User Name: **Juan, Rocha**

User Role(s): **ADAP_EW_PSI_PHPHII**

Organization Type:
 DSHS Central Office Administrative Agency Provider Agency Pharmacy Prevention

On the User Scope Assignment page, the following existing roles will be assigned an Organization Type of 'DSHS Central Office':

- ADAP Data ManAdmin
- ADAP EW PSI PHPSII
- ADAP EW PSIII
- ADAP EW PSIV PSV
- ADAP Order Processor
- DSHS Warehouse Staff

On the Task Board, the THMP Owner field will display all users with the below roles and will no longer display users based on the THMP Region selected:

- ADAP EW PSI PHPSII
- ADAP EW PSIII
- ADAP EW PSIV PSV

Additionally, the THMP Region will continue to be displayed on the Task Board, however, it will no longer drive the list of THMP Owners that display for selection.

TCT users will be able to view that all the THMP roles have been assigned to DSHS Central Office, hence ensuring those roles are not assigned to specific individual THMP Region.