Take Charge Texas (TCT)
User Engagement Session

December 18th, 2023
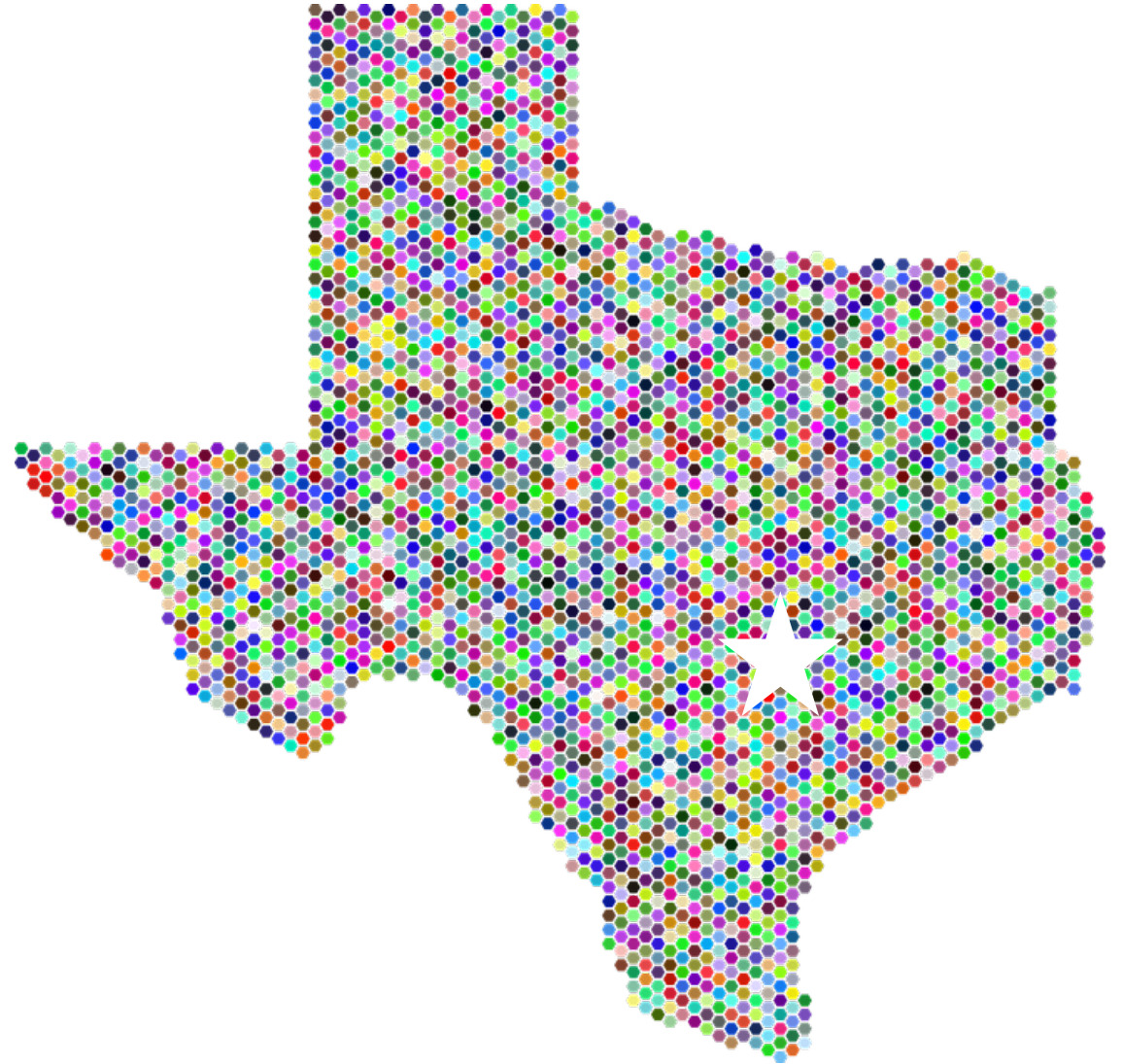
Meet the Facilitators

DSHS/HHSC TEAM

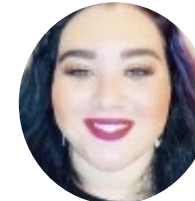**Charletha Joseph**
Program Support

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THMP Director

Christine Salinas
ADAP Manager

Holly Benavides
TCT Help Desk Manager

Ethel Garcia
Medication Data and Analysis
Group Manager

DELOITTE TEAM

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Project Manager

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Caleb Fingel
Analyst/Discovery

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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.
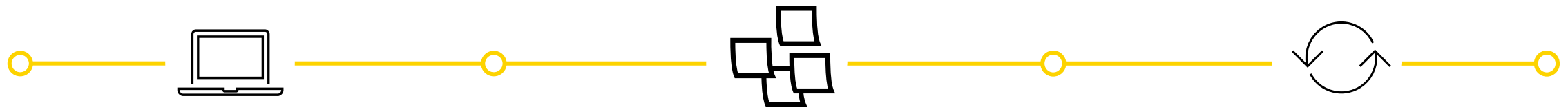
SYSTEM AWARENESS

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

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

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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.

User Stories

Sprint 9
- Masking SSN on Client Search and Client Details Screens
- Display Created By on Order Dashboard
- Notification for Order Override Denials for Pharmacist
- Notification for Order Override Approvals for Pharmacist
- Pharmacy Notes on Pharmacy Details Screen
- Merging Eligibility Records by Eligibility Decision Date for Clients with the Same Subprogram
- Addition of TX Department of State Health Services on the HAB Report
- HAB Report – Multiple Agency Selection
- Generating Pharmacy Copy Letters Based on Latest Transaction
- Updated Services Import XML Process to Include AIDN
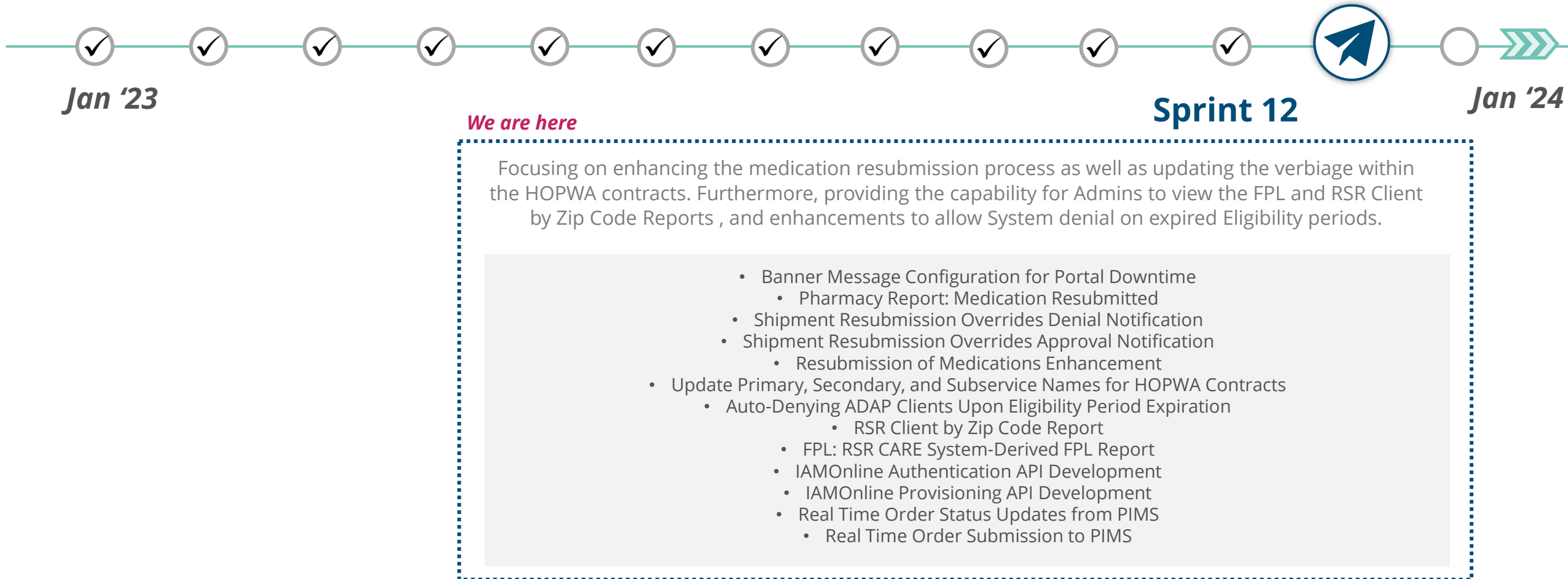- Updated Medical Import XML Process to Include AIDN

Sprint 10
- Client Financial Information Enhancements
- Creating History Log: Financial Data
- Relationships Screen Enhancements
- Creating History Log: Insurance History
- Pharmacy Portal: Indication Whether Batches were Received
- Resubmission Process for Resubmission of Orders
- RSR: Calculating Missing FPL Values for CARE Clients via Batch
- FPL Process: Create Client Import Process Enhancement
- STFP Process: Service Records Updates
- STFP Process: Service Records – Successful Client Update Email
- STFP Process: Service Records – Failed Client Update Email
- STFP Process Medical Records Updates
- STFP Process: Medical Records – Successful Client Update Email
- STFP Process: Medical Records – Failed Client Update Email

Sprint 11
- Document Start and End Date Enhancements
- Standardize Login Error Messages in Agency Portal
- FPL: Overriding System Derived Household FPL for CARE Clients
- Enhancements to Comments Provided When Overriding or Ending Eligibility
- TCT Client Portal – Instructional Text Updates
- Order Override Accessibility Enhancement
- Shipment Resubmission Overrides
- Client Medicine Order History Enhancements
- Pharmacy Report: Client Regimen Overrides
- Pharmacy Report: Order Overrides
- Ad Hoc Query: Facility Information Enhancements
- Removing Pre-Selected Services on Recert and Self-Attest Applications

Project Plan: In Progress Features

The graphic below represents the features & user stories our team is currently consuming for Sprint 12.

Jan '23

We are here

Sprint 12

Jan '24

Focusing on enhancing the medication resubmission process as well as updating the verbiage within the HOPWA contracts. Furthermore, providing 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.

- 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
- Auto-Denying ADAP Clients Upon Eligibility Period Expiration
- RSR Client by Zip Code Report
- FPL: RSR CARE System-Derived FPL Report
- IAMOnline Authentication API Development
- IAMOnline Provisioning API Development
- Real Time Order Status Updates from PIMS
- Real Time Order Submission to PIMS

Project Plan: Upcoming Features

The below Epics were prioritized during the Program Increment Planning Session on December 14, 2023, as Highest and High priority.

Specific Sprint plan will be discussed with DSHS team and shared in the future Sessions.

Poll Everywhere

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

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System Overview: **New** TCT Features

Live Demonstration of TCT Features

TCT Features Video Presentation

- **IH-3271 – Document Start and End Date Enhancements**
- **IH-3265 – End THMP Eligibility & Override THMP Eligibility Enhancements**
- **IH-3262 – FPL: Overriding System Derived Household FPL for CARE Clients**
- **IH-3261 - Standardize Login Error Messages in Agency Portal**
- **IH-3260 – TCT Client Portal – Instructional Text Updates**
- **IH-3259 – Order Override Accessibility Enhancement**
- **IH-3249 – Client Medicine Order History Enhancements**
- **IH-3248 - Shipment Resubmission Overrides**
- **IH-3239 – Pharmacy Report: Client Regimen overrides**
- **IH-3238 – Pharmacy report: Order Overrides**
- **IH-3193 – Allow Users to Update My Needs on Selections on Recerts/Self-Attests**
- **IH-3182 – Ad Hoc Query: Facility Information Enhancements**

Gathering Your Feedback

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Poll Everywhere

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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.

Thank You!

System Overview: **New** TCT Features

Feature Updates: Sprint 11

Document Start and End Date Enhancements

The Review Application screen of all application workflows (*in both Agency and Client Portal*), as well as the Application History pdf (*in Agency Portal*) will include the below new fields:

- Document Start Date, Document End Date

In the agency portal, on the 'Multi-Provider Document Verification' page screen, the following new columns will be available:

- Document Start Date, Document End Date, Verification Comments, Updated 'Action' Column to display Edit hyperlink providing Users the capability to edit the Document Start Date and Document End Date

in the 'Upload Files for Your Application' section:

- *Document Start Date*
- *Document End Date*

In the 'Files Ready to Upload' section, the below new columns have been added to the existing table

- *Document Start Date*
- *Document End Date*
- *Comments*
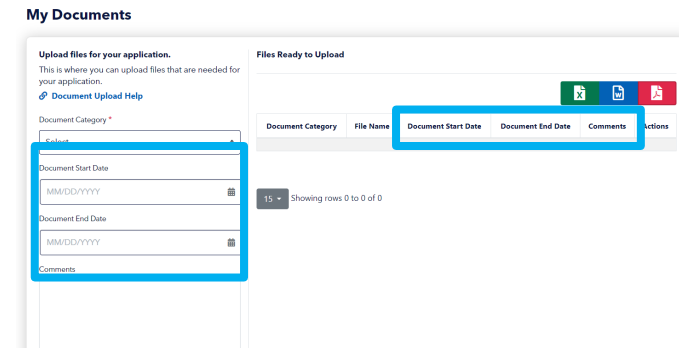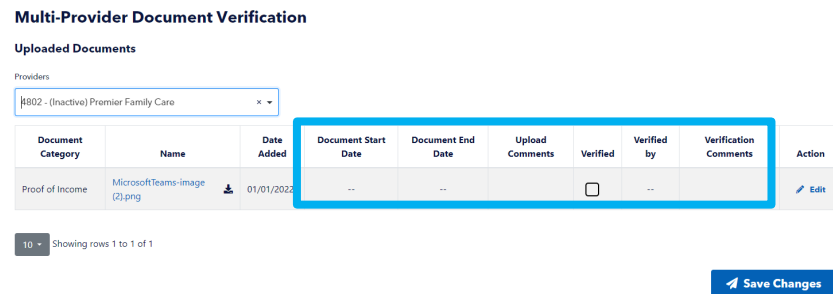
TCT Users will be able to define a range of time that a client's uploaded document is valid so that Proof of Income documents will be picked up by the FPL batch if they are considered valid during the RSR reporting period but were not uploaded until after the RSR reporting period.

Feature Updates: Sprint 11

Document Start and End Date Enhancements Continued

New banner is displayed when the 'Verified' check box is checked off by a User, with the below message: 'Select the 'Edit' button to provide verification comments before saving changes as verification comments cannot be updated after document verification'

When a user selects 'Edit', a pop-up appears in which only certain fields are editable, as noted below:
- Document Category (*non-editable*)File Name (*non-editable*), Date Added(*non-editable*), Document Start Date (*User editable*), Document End Date (*User editable*), Upload Comments(non-editable), Verified, Verified by (non-editable), Verification Comments

In addition, the FPL batch will follow has the following new logic:

- *A client's verified Proof of Income Document must have a 'Date Added' that falls within the RSR reporting period*

If the client's verified Proof of Income Document does not have a 'Date Added' that falls within the RSR reporting period, the date range defined by the Document Start Date and Document End Date must fall within the RSR reporting period.

Document Record

Document Category	File Name	Date Added
Proof of Income	MicrosoftTeams-image (2).png	01/01/2022 12:01:31 PM

Document Start Date	Document End Date	Upload Comments
MM/DD/YYYY 🗓	MM/DD/YYYY 🗓	

☐ Verified

	Verified by	Verified Comments

Save **Cancel**

TCT Users will be able to define a range of time that a client's uploaded document is valid so that Proof of Income documents will be picked up by the FPL batch if they are considered valid during the RSR reporting period but were not uploaded until after the RSR reporting period.
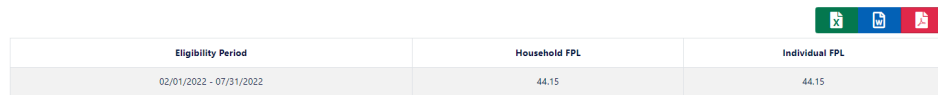
Feature Updates: Sprint 11

FPL: Overriding System Derived Household FPL for CARE Clients

TCT Users will now have access to FPL data shown in the 'Eligibility Calculated FPL' section and the 'System Derived FPL' section with the option to override the data.

On the CARE Service Referrals screen, a section titled 'Eligibility Calculated FPL' has been created to display Eligibility Period, Household FPL and Individual FPL values:

Care Service Referrals

Eligibility Calculated FPL

Eligibility Period	Household FPL	Individual FPL
02/01/2022 - 07/31/2022	44.15	44.15

Beneath the new 'Eligibility Calculated FPL' table, a new section will be displayed as 'System Derived FPLs' with a new table shown below:

System Derived FPLs
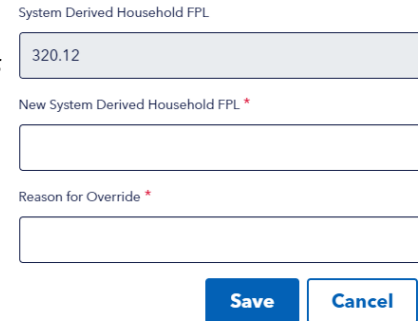
Update Date	System Derived Household FPL	Source	FPL Date	Updated By	Override	Reason for Override
11/29/2023 3:31 PM	320.12	Create Client Import	11/29/2023 3:31 PM	Create Client Import	⊘ Override	

The 'Override' button in the Override column is only enabled for selection when the following conditions are met:

- *The user overriding the System Derived Household FPL has one of the following roles: HRAR Admin, Data Manager*

- *The System Derived Household FPL Source must be 'Create Client Import' or 'User Override'*

- *The System Derived Household FPL being overridden is the most recent record in the System Derived FPLs table*

Override System FPL

System Derived Household FPL

320.12

New System Derived Household FPL *

Reason for Override *

Save   **Cancel**

When a user selects the 'Override System FPL' button, the following will occur:

- *A pop-up, titled Override System FPL, will appear with the following information:*

System Derived Household FPL, New System Derived Household FPL , Reason for Override

Upon entering the mandatory information on the 'Override System FPL' pop-up and saving the data, the following will occur:

- *A new row will be created in the System Derived FPL table indicating the Update Date, System Derived Household FPL, Source, FPL Date, Updated By, and the Reason for Override*
  - *The new FPL value provided by the user will be reflected in the RSR report when an eligibility calculated FPL is not present for the RSR reporting period.*

When a THMP Eligibility is conducted after the client has a value / record in the System Derived FPL table, the new THMP Eligibility FPL value will be reflected in the System Derived FPL table, as it will be the latest FPL value.

TCT Users will be able to override the System Derived Household FPL when the System Derived Household FPL Source is Create Client Import or User Override so that they can correct the data if it was incorrectly provided on the Create Client XML file and ensure the correct FPL value gets reflected on the RSR.

Feature Updates: Sprint 11

Enhancements to Comments Provided When Overriding or Ending Eligibility

TCT Users will have access to user comments on the 'Eligibility Summary' page, 'Eligibility History' page, and 'Client Eligibility Status Search Report' page.

- *On the Eligibility Summary page screen, in the Current Eligibility Period table, the below new column is introduced: Immediate Denial*

- *Additionally, the 'Denial Reasons' column is updated to 'Eligibility Decision'.*

On the Eligibility History page, the below new column is added: Immediate Denial

On the Client Eligibility Status Search Report, the following updates have been made:

The 'THMP Reason' column will reflect the data that exists in the 'Eligibility Decision' column if the Eligibility Status is Approved, Rejected, or Denied

The 'CARE Reason' column will reflect the data that exists in the 'Eligibility Decision' column if the Eligibility Status is Approved, Rejected, or Denied

TCT users will be able to view user-entered comments when overriding or ending eligibility so that they can easily sort and filter the data that exists in the Client Eligibility Status Search Report.

Feature Updates: Sprint 11

Enhancements to Comments Provided When Overriding or Ending Eligibility Continued

When a User is undergoing the process of overriding the system-recommended eligibility decision, the following updates have been made:

- *On the 'Eligibility Override' page, the Comments field box is updated to be an optional field for THMP Programs only*

  - *The Comments will remain mandatory for CARE programs.*

- *The Reject Reason, Pend Reason, or Denial Reason provided reflects in the 'Eligibility Decision' column on the Eligibility Summary page and no longer reflect in the 'Eligibility Status' column*

When a User is on the Eligibility Summary screen, and chooses to End THMP Eligibility or End Care Eligibility, the following updates have been made:

- *The Comments field box on the End THMP Eligibility pop-up, is updated to be an optional field for THMP Programs only.*

For THMP programs only, the Denial Reason picklist has been updated to reflect the same reasons provided during the overriding Eligibility process.

Upon ending the eligibility period:

- *A value of 'Yes' will display in the Immediate Denial column for the applicable program*

- *The Denial Reason provided will reflect in the 'Eligibility Decision' column*

- *If any comments were provided when ending the eligibility, the comments will display in the 'Override Comments' column and no longer be appended to the Denial Reason*

TCT users will be able to view user-entered comments when overriding or ending eligibility so that they can easily sort and filter the data that exists in the Client Eligibility Status Search Report.

Feature Updates: Sprint 11

TCT Client Portal – Instructional Text Updates

TCT Users will now view additional instruction, in both English and Spanish, when logging into the Client Portal.

Welcome to TakeChargeTexas!

Begin by registering today if you are living with HIV and would like to apply or have already been receiving assistance for medications, medical care, or support services but do not already have a TakeChargeTexas account.

Log In if you already have a Take Charge Texas account.

You now have access to a new online system, Take Charge Texas (TCT).
You are encouraged to do the following:

- Contact your local agency or clinic to help you complete the application online through the Agency Portal.
- If you want and can create your own account, you may go to **takechargetexas.gov** and **register**.
- To be able to register, you must have an email address. You will be asked to create a user ID and a password.
- Once you have created your account, please contact your local agency or clinic who will then need to contact their Data Manager to Link the account you created with the account that already exists in TCT for you.
- Once the accounts have been linked, you will be able to log into the client portal and submit your application.

You do not need to register if you are interested in learning about HIV and STD's, testing and prevention resources like PrEP and nPEP. Go to the quick links at the bottom of this page.

If you need assistance or have questions, please use the Help button above.

¡Bienvenido a TakeChargeTexas!

Si vive con VIH y le gustaría solicitar o ya está recibiendo asistencia para medicamentos, atención médica o servicios de apoyo, pero aún no tiene una cuenta en TakeChargeTexas, empiece inscribiéndose hoy mismo.

Inicie una sesión si ya tiene una cuenta en Take Charge Texas.

Ahora tiene acceso a un nuevo sistema en línea, Take Charge Texas (TCT).
Se le anima a hacer lo siguiente:

- Comuníquese con su agencia o clínica local para ayudarle a completar la solicitud en línea a través del Portal de la Agencia.
- Si quiere y puede crear su propia cuenta, puede ir a **takechargetexas.gov** y **registrarse**.
- Para poder registrarse, debe tener una dirección de correo electrónico. Se le pedirá que cree una identificación de usuario y una contraseña.
- Una vez que haya creado su cuenta, comuníquese con su agencia o clínica local, quien deberá comunicarse con su Administrador de datos para vincular la cuenta que creó con la cuenta que ya existe en TCT para usted.
- Una vez que las cuentas se hayan vinculado, podrá iniciar sesión en el portal del cliente y enviar su solicitud.

No necesita inscribirse si solo está interesado en aprender sobre el VIH y las ETS, las pruebas de detección y los recursos de prevención como la PrEP y la nPEP. Consulte a los enlaces rápidos en la parte inferior de esta página.

Si necesita ayuda o tiene preguntas, haga clic el botón 'Ayuda' de arriba.

TCT Users will be able to see additional help text on the Welcome page of the client portal so that they are aware of any additional steps they should take to manage their account.

Feature Updates: Sprint 11

Order Override Accessibility Enhancement

TCT Users will now have access to Order Override requests through a new report titled 'Order Overrides by Pharmacy Report'.

The following user roles will have access to the 'Client Regimen Overrides Report':

- *HRAR_Admin, ADAP DataManAdmin, ADAP Order Processor, Pharmacist User*

The following search criteria filters will be available for the User:

- *Pharmacy , Pharmacists will only be able to view results for the Pharmacy they are associate with.*

- *Submitter First Name, Submitter Last Name, Client ID, Order Denial Reason , This multi-select, optional field will be a dropdown with the below options, Too early for a refill, Drug not in client's drug regimen, Client is not a part of ordering Pharmacy, Strength does not match drug regimen, Quantity has exceeded MaxPerMonth for Medication, Order Override Decision, Start Date, End Date*

The following validation message will be displayed on the screen and will appear as a validation if the User clicks on Search without selecting any of the search criteria:

- *Please select at least one search filter before proceeding*

Above the results table on the Client Regimen Overrides Report screen, the below fields will be displayed and populated based on the selection made on the Start and End Dates:
- *Report Start Date*
- *Report End Date*
- *If no date selected, then both the above fields will populate as 'All Dates'*

TCT Users will be able to view all the Order Overrides requested by any particular pharmacy in a given time duration, so that they can track this information and ensure process is efficient.

Feature Updates: Sprint 11

Shipment Resubmission Overrides

ADAP Order Processors and THMP Admin will now have access to a new page titled 'Shipment Resubmission Overrides'.

The logic which will be followed on the Shipment Resubmission Overrides screen:

- *THMP Admin or ADAP Order Processor will navigate to the Shipment Resubmission Overrides screen, review the resubmit reason and provide a decision.*

If the new Order ID has line items from multiple pharmacies, the System will create different Order ID (once approved) which will group the line items on a pharmacy level, the date the Order Override request was submitted by the Pharmacist, AND the Username of the submitter.

ADAP Order Processor or THMP Admin will be able to view all the resubmission override requests so that they can indicate a decision for resubmission.

Client Medicine Order History Enhancements

On the 'Client Medicine Order History' screen, the below new columns are added:

- *Resubmitted Order ID, Order Resubmission Date*

On the 'Client Medicine Order History' screen, the below columns are updated:

- *Order ID' column updated to 'Original Order ID', 'Order Submission Date' column updated to 'Original Order Submission Date', Medication Resubmitted*

If a medication was denied in the 'Shipment resubmission Overrides' screen, this field will be populated as 'Denied'.

If there was no decision provided, then it will be populated as Pending Approval.

If a particular medication didn't go through a resubmission, there will be no value in this column.

Resubmitted Order ID: this column will be populated with the Order ID that is created when the THMP Admin or ADAP Order Processor approves the Shipment Resubmission Override Request.

- *If a particular medication didn't go through a resubmission, there will be no value in this column.*

Order Resubmission Date: this column will be populated with the date on which the Order was resubmitted from the Review Order screen

- *If denied, this field will be blank.*

TCT Users will be able to view the updates on the Client Medicine Order History screen for medications which were resubmitted so they can track the updates.

Feature Updates: Sprint 11

Pharmacy Report: Client Regimen Overrides

TCT Users will now have access to Client Regimen Override requests through a new report titled 'Client Regimen Overrides Report'.

The following user roles will have access to the 'Client Regimen Overrides Report':

- *HRAR_Admin, ADAP DataManAdmin, ADAP Order Processor*

The following search criteria filters will be available for the User:

- *Client ID, Client Regimen Denial Reason, Submitting User Agency , Submitter First Name, Submitter Last Name, Client Regimen Override Decision, Start Date, End Date*

The following validation message will be displayed on the screen and will appear as a validation if the User clicks on Search without selecting any of the search criteria:

- *Please select at least one search filter before proceeding.*

If a User enters a search criterion which is pulling too large of a dataset, the System will timeout and render the below validation:

- *Please refine your search results.*

Above the results table on the Client Regimen Overrides Report screen, the below fields will be displayed and populated based on the selection made on the Start and End Dates:

- *Report Start Date*

- *Report End Date*

- *If no date selected, then both the above fields will populate as 'All Dates'*

TCT Users will be able to view all the Client Regimen Overrides requested by any TCT User in a given time duration, so that they can track this information and ensure process is efficient.

Feature Updates: Sprint 11

Pharmacy Report: Order Overrides

TCT Users will now have access to Order Override requests through a new report titled 'Order Overrides by Pharmacy Report'.

The following user roles will have access to the 'Client Regimen Overrides Report':

- *HRAR_Admin, ADAP DataManAdmin, ADAP Order Processor, Pharmacist User*

The following search criteria filters will be available for the User:

- *Pharmacy, Submitter First Name, Submitter Last Name, Client ID, Order Denial Reason, Order Override Decision, Start Date, End Date*

The following validation message will be displayed on the screen and will appear as a validation if the User clicks on Search without selecting any of the search criteria:

- *Please select at least one search filter before proceeding*

Above the results table on the Client Regimen Overrides Report screen, the below fields will be displayed and populated based on the selection made on the Start and End Dates:

- *Report Start Date*

- *Report End Date*

- *If no date selected, then both the above fields will populate as 'All Dates'*

TCT Users will be able to view all the Order Overrides requested by any particular pharmacy in a given time duration, so that they can track this information and ensure process is efficient.

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Feature Updates: Sprint 11

Ad Hoc Query: **Facility Information Enhancements**

When a User selects Client Demographics as the data source on the Ad Hoc Query Builder screen, navigates to the Table and Column Details screen and clicks on Add Record, the Add Table Column Details Record pop-up will have the following updates:

On the Ad Hoc Query, when a User selects Client Incarceration as the Table Name,

- *A new data element titled 'Facility Name' in the Column Name field dropdown is displayed*

- *The Incarceration End Date option on the Column Name field is updated to 'Approximate Date of Release'*

- *'Has Received Medication on Release?' is updated to 'Did the Client Receive Medication Upon Release?' in the Column Name field dropdown (updated the populated value of 'YS' to YES)*

- *'Medication Detail' data element is updated to 'How much Medication Did the Client Receive?' in the Column Name field dropdown*

- *'CorrectionalId' is updated to 'Correctional ID No'*

The below have been removed as options from the Column Name dropdown:

- *SPN No, TDCJ No, Incarceration Begin Date, ClientIncarcerationId*

Edit Record

Table Name *

| Client Incarceration | ⇕ |

Column Name *

Approximate Date of Release ×	Correctional ID No ×	Client Id ×
Did the Client Receive Medication Upon Release? ×	× ▾
Facility Name ×	How much Medication Did the Client Receive? ×

Save   **Cancel**

On the Client Dashboard, on the About You screen,

- *'TDCJ or SPN Number or Correctional ID' field is updated to 'Correctional ID No' on the main screen,*

Facility Information History Log

- *'TDCJ or SPN Number or Correctional ID' field column is updated to 'Correctional ID No',*

- *'Received Medication' column is updated to 'Did the Client Receive Medication Upon Release?'*

- *'Received Medication Amount' column is updated to 'How much Medication Did the Client Receive?'*

Facility Information History Log

Updated By	Date	Release Date	Facility Name	Correctional ID No	Did the Client Receive Medication Upon Release?	How Much Medication Did The Client Receive?
admin_admin	12/01/2023 1:19 PM	11/29/2023	Amex		No	

15 ▾ Showing rows 1 to 1 of 1

Close

TCT Users will be able to use the Ad Hoc Query Builder to curate a report to retrieve Facility Information from the Client's dashboard accurately, so that they can perform analysis and track the information.

Feature Updates: Sprint 11

Removing Pre-Selected Services on Recert and Self-Attest Applications

When a User is completing a Self-Attestation or Re-certification application, the below logic will be applied on the My Needs page of the application workflow in both the agency and client portal:

- *The User will now be able to de-select the pre-selected CARE and/or THMP services the client is currently enrolled in. Users will not be able to select any new services on the My Needs page and will continue to need to submit a referral application to do so. When de-selecting pre-selected services, at least one service must remain selected on the page to proceed with the application*

The help text that displays beneath 'Update My Needs' will be updated to the following:

- *You are enrolled in the service(s) listed below. Please review and certify your information on the following pages to make sure it is accurate, so that you may continue receiving the benefits. You can remove the selected services you no longer need from this section below. When submitting a Renewal Application, it will only be submitted for the selected services.*

My Needs

Update My Needs
You are enrolled in the service(s) listed below. Please review and certify your information on the following pages to make sure it is accurate, so that you may continue receiving the benefits. You can remove the selected services you no longer need from this section below. When submitting a Renewal Application, it will only be submitted for the selected services.
- This update is specific to re-certifications and self-attestation applications only.

When a User de-selects services and clicks on Continue, the below validation message will be displayed: You have removed service(s) from this application. Your Application will only be submitted for the services which remain selected. Please validate before proceeding forward.

As multiple CARE services can be selected on the My Needs page of the application, users will have the ability to either remove all pre-selected CARE services (only if the client is enrolled in both THMP and CARE services), or only remove a subset of the re-selected CARE services.

When a user removes only a subset of the pre-selected CARE services and leaves at least one CARE service still selected, the following will occur upon application submission:

- *(a) The status of the de-selected CARE service on the home page of the client dashboard will follow the below logic:*

If the re-certification or self-attestation is submitted prior to the end of the current eligibility period, the status of the de-selected CARE service will remain 'Approved' until the end of the current eligibility period. On the day following the end of the current eligibility period, the status of the de-selected CARE service will be updated to 'Denied'. If the re-certification or self-attestation is submitted after the end of their current eligibility period, the status of the de-selected CARE service is immediately updated to 'Denied' on the client dashboard at the time of application submission.

- *(b) The Application pdf will not reflect the de-selected CARE service(s) (c) The current CARE eligibility period will not be impacted*

TCT Users will be able to de-select a pre-selected service on the My Needs page of a Recertification and Self-Attestation application so that they don't have to reapply for the service if they no longer have a need for it.

Feature Updates: Sprint 11

Removing Pre-Selected Services on Recert and Self-Attest Applications Continued

When a user removes all pre-selected CARE services, the following will occur upon application submission in addition to (a), (b), and (c) above:

- *(d) The Task Board will not reflect 'CARE' in the Program column of the task that was generated for the re-certification or self-attestation*

- *(e) Users will not have the ability to process CARE eligibility for the application*

As only one THMP service can be selected on the My Needs page of the application, when the pre-selected THMP Service is removed from a re-certification or self-attestation application, the following will occur upon application submission:

- *The status of the de-selected THMP service on the home page of the client dashboard will follow the below logic:*

  - *If the re-certification or self-attestation is submitted prior to the end of the current eligibility period, the status of the de-selected THMP service will remain 'Approved' until the end of the current eligibility period. On the day following the end of the current eligibility period, the status of the de-selected THMP service will be updated to 'Denied'.*

  - *If the re-certification or self-attestation is submitted after the end of their current eligibility period, the status of the de-selected THMP service is immediately updated to 'Denied' on the client dashboard at the time of application submission.*

Additionally, the below impact will be visible in the TCT Portal with this feature:

- *The Application pdf will not reflect the de-selected THMP service*

- *The current THMP eligibility period will not be impacted*

- *The system will continue to follow the current process for placing the client on a system hold if the client had de-selected ADAP (On hold process does not apply for TIAP or SPAP)*

- *The Task Board will not reflect 'THMP' in the Program column of the task that was generated for the re-certification or self-attestation*

- *Users will not have the ability to process THMP eligibility for the application*

TCT Users will be able to de-select a pre-selected service on the My Needs page of a Recertification and Self-Attestation application so that they don't have to reapply for the service if they no longer have a need for it.