Take Charge Texas (TCT) User Engagement Session September 21st, 2023

Meet the Facilitators



Meeta Sharma

Test Lead

Holly Benavides TCT Help Desk Manager



Rachel Sanor THMP Director



Ramani Siddharthan TCT Help Desk



Hunter Chernyha Team Lead/Scrum Master



Ethel Garcia

Medication Data and Analysis

Group Manager

Christine Salinas

ADAP Manager

Krishna Dixit Consultant/Discovery

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Nikki Fernandes

Project Manager

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?

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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.



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implement in TCT.

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 I

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.



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



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

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 ReportInactivating 'Apply Now' for Linked
- Clients
 Updating Filters to Multi-Select Values
- Addition of THMP Subprograms
- Addition of Date Submitted Filters

Sprint 3

User Stories

- 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



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.

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

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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

User Stories

- 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 UpdatesTask Board Displaying Reason for
- Emergency Application
- Performing Bulk Edits on the Task Board: THMP Owner & CARE Owner
 Bamove THMP Region from User Sc
- Remove THMP Region from User Scope
 Assignment

Sprint 8

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

Project Plan: In Progress Features

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



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.



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

TCT USER ENGAGEMENT SERIES

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

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

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Gathering Your Feedback



Poll Everywhere

Poll Everywhere

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

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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 <u>Charletha.Joseph@dshs.texas.gov</u>. 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, October 19th.

Thank You!

System Overview: **New** TCT Features



Creating History Logs: Relationships

TCT Users will now be able to click on the 'Relationship Detail History' hyperlink and view a pop-up which details the updates conducted related to this screen for specific fields post the implementation of this feature.

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TCT Users will have the ability to track when changes are conducted on the 'Relationships' page of a client so that they can be aware of the client's history. 22 | Copyright © 2023 Deloitte Development LLC. All rights reserved.

TCT Users will be able to track when changes are conducted on the HIV Diagnosis Details, HIV Medication Info, and Risk Factors pages of a client so that they can be aware of the client's history.

Creating History Logs: Medical Data

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Creating History Logs: About You Information

TCT Users will now be able to click on the 'Personal Information History', 'Facility Information History', 'Physical Address History', 'Mailing Address History', 'Contact Info History' and 'Emergency Contact History' hyperlinks and view a popup which details the updates conducted related to this screen for specific fields post the implementation of this feature.

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TCT users will be able to track when changes are conducted on the 'About you' page of a client so that they can be aware of the client's history.

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Creating History Logs: Authorized Release



Authorized Release

elease Inforn	nation							Add Release
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TCT Users will now be able to click on the 'History' hyperlink for each particular record and view a pop-up which details the updates conducted related to that particular record for specific fields post the implementation of this feature.

TCT Users will be able to track when changes are conducted on the 'Authorized Release' page of a client so that they can be aware of the client's history.

Updates to Automated & Manual Client Merge Exception Handling

In the following scenarios, it will no longer throw an error and instead proceed with the automated and manual merge process:

- Two clients undergoing merge have different Share Status
 - Both automated and manual merge process will pick up the latest data for Share Status, based on the latest transaction, for the new merged client ID
- Two clients undergoing merge have same Share Status (both with No as Share Status)
 - Both automated and manual merge process will pick up 'No' as the Share Status for the new merged client ID
- Two clients undergoing merge have different Client Status (one Client has a status of 'Active' and the other has a status of 'Inactive' with "Inactive Other' as the Inactive Type)
 - Both automated and manual merge process will pick up 'Active' as the Client Status for the new merged client ID
- Two clients undergoing merge have same Client Status (with both as 'Other Inactive Type' or both as 'Deceased')
 - Both automated and manual merge process will pick up 'Inactive' as the Client Status for the new merged client ID
- Two clients undergoing merge have conflicting THMP/CARE subprogram
 - Both automated and manual merge process will pick up the THMP/CARE subprogram which has the latest Eligibility Decision Date for the new merged client ID

Manual Merge Only: Two clients undergoing merge have same CARE subprogram

• The process will move forward with consolidating all CARE services and retains the care services with the latest 'Added On' date per service record for the new merged client ID

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.

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Update THMP Denial, Pend, & Reject Reasons when Overriding Eligibility Recommendation

The list of Reject and Denial Reasons, when a User chooses to override the system recommendation THMP eligibility and chooses to reject/deny the client, has been updated to the below.

Updated List of Reject & Denial Reasons: Override Only	
Deceased	
Does not meet insurance eligibility requirements - ACA Plan	
Does not meet insurance eligibility requirements - Medicare and Full LIS	
Does not meet insurance eligibility requirements - Private insurance	
Does not meet residency eligibility requirements (out-of-state, out of service	
area)	
Failure to provide acceptable proof of residency	
Failure to provide acceptable Health Insurance Information	
Failure to provide acceptable Proof of Income or Support for applicant or spo	ouse
Failure to provide more than one of the following: Proof of Income, Proof of	
Residency, Proof of Diagnosis, Health Insurance Information	
Failure to provide proof of household change, when required	
Failure to provide verification documents, when required	
Inactivity Denial	
Incarcerated	
Income exceeds eligibility requirements based on FPL	
Lives in a Nursing Home, Hospital, or other community facility responsible fo	r
medical care	
Missing Proof of Diagnosis	
Negative HIV Confirmatory Test Result	
One or more pages are missing from the application or parts of the application	on
are blank	
Other	
TCT error (such as approved by unauthorized staff member, duplicate, etc.)	
The application is not dated	
The application is not signed	
The application signature and date are over 60 days old	
Voluntary Application removal by client or Agency Worker	

The list of Pend Reasons, when a User chooses to override the system recommendation THMP eligibility and chooses to pend the client, has been updated to the below:

 The 'Other' value is updated to no longer display a free-text field once selected

The updates for Reject Reason, Pend Reason and Denial Reason will be reflected in the following locations:

Client's Eligibility Summary page, Client's Eligibility History page, Client Eligibility Status Search Report, and the Pending Eligibility Report

Reject Reasons for THMP Override

Program:	
BigBility Recommendation: Reject	
Reject Reason: Negative HIV Confirmatory Text Result	
Dverride Details	
торып: *	
SPAP	:
Conturs *	
Reject	
Reject Reason: *	
Select	
Deceased	i
Does not meet Residency eligibility requirements (out of state, out of service area)	
Does not meet insurance eligibility requirements - ACA Plan	
Does not meet insurance eligibility requirements - Medicare and Full LIS	
Does not meet insurance eligibility requirements - Private insurance	

Pend Reasons for THMP Override

hogram	
Eligibility Recommendation: Reject	
Reject Reason: Negative HIV Confirmatory Text Result	
Overvide Details	
Program: *	
SPAP	
Status *	
Pend	
Pend Reason: *	
Select	
Acceptable proof of Insurance is missing	
Acceptable proof of US determination	
Acceptable proof of current TX Residency is missing	
Acceptable proof of income is missing	
Acceptable proof of positive HIV test is missing	

Deny Reasons for THMP Override

hoerant	
ligibility Recommendation: Frient	
leject Resson: Negative HV Confirmatory Test Result	
Verride Details	
hograni: *	
SPAP	
farbas f	
Deny	
Innial Reason: *	
Select	
Deceased	
Does not meet Residency eligibility requirements (out-of-state, out of service area)	
Does not meet insurance eligibility requirements - ACA Plan	
Does not meet insurance eligibility requirements - Medicare and Full US	
Does not meet insurance eligibility requirements - Private insurance	

TCT users will be able to view an updated list of Denial, Pend, & Reject Reasons available when they are overriding the system recommendation for THMP eligibility so that they can easily report on this data.

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Ability to Manually End Ongoing Eligibility

There are two new fields titled, 'End THMP Eligibility' and 'End CARE Eligibility' on the Eligibility Summary screen for Users to click on.

Current Eligibi	ility Period:						
Program	Sub-Program	Eligibility Decision Date	Eligibility Start Date	Eligibility End Date	Eligibility Status	Override	Override Comments
CARE	RW Care	07/24/2023	07/24/2023	02/29/2024	Approved	Yes	test
тнмр	ADAP	07/24/2023	07/24/2023	02/29/2024	Approved	Vor	tect

The 'End THMP Eligibility' and 'End CARE Eligibility' will only be enabled for selection when the following conditions are met:

- The role of the user attempting to end the eligibility has been given access through the Role to Screen Mapping feature
- The client has a current THMP eligibility record with a status of 'Approved'

When a User clicks on 'End THMP Eligibility' or 'End CARE Eligibility', pop-up will appear, with the Denial Reason as a multi-select picklist field and a Comments mandatory free text field.

	End THMP Eligibility
	Please provide the Denial Reason and additional comments for why you are manually ending the client's current eligibility period
End CARE Eligibility	Program : THMP
Please provide the Denial Reason and additional comments for why you are manually ending the client's current eligibility period	SubProgram: ADAP
Program: CAR	Denial Resson *
SubProgram : RVICARE	
Denial Reason *	36601 ·
Select to Option	Select
news as shown	Client Refusit to Compare 6-month Update Client Refusit to Compare Annual Resident
Convertes*	Currently Incarcerated
	Does not meet Insurance eligibility requirements
	Does not meet tesidency engineering to do to state, out of service area) Income exceed existility requirements sout of service area) Income exceed existility requirements sout of service area)
Submit Court	Incomplete/Missing Proof of Income Supporting Documents
Cancer	Incomplete/Missing Proof of Insurance Documentation
	Incompetentiating of the income state of the
	Ineligible for some services - Other Insurance (specify)
	Negative HV Confirmatory Test Result
	Not income periodication

When a User clicks on 'End THMP Eligibility' or 'End CARE Eligibility', the following screens will be updated: Eligibility Summary, Eligibility History and Client Dashboard screens.

urrent Eligibil	Ity Period:								Client Application Dashboard	
Program	Sub-Program	Eligibility Deci	ision Date	Eligibility Start Date	Eligibility End Date	Eligibility Status	Override	X D A	Status of Services	
ARE	RW Care	09/07/2023		07/24/2023	05/97/2023	Denied	Nes	test		
HMP	ADAP	09/07/2025		07/24/2023	09/07/2023	Denied	Yes	test	Dental Care	
									Program: CARE-RW Care	
jibility I	History								Program: CARE-RW Care THIMP-Medications (ADAP)	
jibility I	History								Program: CARE BIO Care THAPF-Medications (ADAP) Program: THAP-ADAP	
jibility I	History Sub Program	Start Date	End Date		Decision, Resson	Over	ide Ove	riág Canturants Processed By	Program: CARE BIO Care THAP Andrections (ADAP) Program: THAP ADAP	
Program CARE	Sub Program RW Care	Start Date 07/24/2823 0	End Date 29/97/2023	C Dery Does not meet insurance e	Decision, Resson	Over Yes	ide Ove	niše Commenta sdran admin	Program: CARE BIO Care THMP Andedications (ADAP) Program: THMP ADAP	

TCT Users will now have the ability to manually end a client's current THMP or CARE eligibility record, so that they can end the client's eligibility if information that makes them ineligible becomes available.

Displaying Override Comments after Eligibility is Complete

On both Eligibility Summary and Eligibility History screens, the table will have two new columns titled, 'Override' and 'Override Comments'.

Program	Sub Program	Start Date	End Date	Decision, Reason	Override	Override Comments	Processed By
RE	RW Care	07/24/2023	09/07/2023	Deny,Does not meet Insurance eligibility requirements - test	Yes	test	admin admin
MP	ADAP	07/24/2023	09/07/2023	Deny, Client Refusal to Complete 6-month Update - dsfsf	Yes	test	admin admin

Eligibility Summar

This page is a read- You have be Current Eligibil	only summary of the dient's o en evaluated for th Ity Period:	1 🗎 🗎					
Program	Sub-Program	Eligibility Decision Date	Eligibility Start Date	Eligibility End Date	Eligibility Status	Override	Override Comments
CARE	RW Care	09/07/2023	07/24/2023	09/07/2023	Denied	Yes	test
THMP	ADAP	09/07/2023	07/24/2023	09/07/2023	Denied	Yes	test

If a User either accepts or overrides the system recommendation, the following screens will be updated accordingly: Eligibility Summary and Eligibility History.

TCT users will be able to view the eligibility override comments on the clients' Eligibility History & Eligibility Summary pages, so that they know why the eligibility recommendation from the system was overridden.

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Capturing Hold History for Manual / Automatic Holds

The below are new fields on the Manual Hold screen:

- Hold Date
- Hold Placed By

Both the above fields will be auto-populated when:

- A User places a Client on Manual Hold by indicating the user name of the individual who conducted the action
- The System places the Client on Automated Hold by indicating 'System' as the Hold Placed By



A new section titled, 'Hold History' has been added to reflect updates conducted on this screen, indicating the Action, Hold Reason, Tate and timestamp, along with Updated By and Comments.

When a User removes a Client from Manual or Automated Hold or conducts an updated, the Manual Hold screen will be updated accordingly.

TCT users will be able to know who placed a client on hold (whether by a user or by the system) and when, so that they know when the client's THMP benefits were placed on hold.

Update Create Client Import XML to Include AIDN

The Create Client Import XML file will be updated to include a 'Agency Assigned ID Number (AIDN)' field, which is a non-mandatory field.

If a value is provided in the Agency Assigned ID Number field, the Organization ID is a required field and must be provided on the file. If an Organization ID is not provided, this will result in an exception and the following validation will display:

• "Organization ID must be provided when an AIDN value is present so [last name], [first name] could not be created in TCT."

If the Organization ID provided in the file is not a valid ID that exists in the system, the file will result in an exception and a new client will not be created in TCT. The following validation will display:

• "The Organization ID provided in the file does not exist in TCT so [last name], [first name] could not be created."

When a client has been created through the Create Client Import process and the AIDN was provided on the file, the following will occur in TCT:

On the Agency Specific Information page of the client, a record will be created with the following data:

- Provider Agency = [system will display the name of the provider agency provided on the XML]
- Agency Assigned ID Number (AIDN) = [system will display the value provided in the AIDN field on the XML]



TCT users will be able to view the Agency Assigned ID Number (AIDN) on the Create Client Import XML file so that they can associate the agency's ID for the individual with the client record in TCT.

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