



*Commonwealth of Massachusetts
Executive Office of Health and Human Services
Department of Transitional Assistance*


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**Online Guide Transmittal 2017-86
September 29, 2017**

To:  Department of Transitional Assistance Staff

From:  Sarah Stuart, Associate Commissioner for Change Management

 Paul Sutliff, Assistant Commissioner for Field Operations

Re:  Cross Programs: Phone Related Updates

Overview

DTA continues to make enhancements to improve service deliver for clients and to provide staff the supports necessary to deliver those services. One of the ways DTA can ensure access for most clients is through phone interactions.

Purpose

The purpose of this Online Guide Transmittal is to:

- advise staff of changes to how a client's phone number is recorded on BEACON;
 - remind staff of the critical importance of confirming with clients the best number to reach them at;
 - identify the new Schedule Timely Appointment Action page in the Online Guide; and
 - advise staff of the eligibility of prepaid phones for the Phone SUA.
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**BEACON
Changes**

Scheduled for October 2, 2017, BEACON will retain a single phone number for the household. This is to ensure that the best phone number to reach the client is dialed and is anticipated to reduce failed contact attempts.

The vast majority of clients only have one phone number identified on BEACON at this time. Cases with more than one phone number on BEACON will be converted to have the most recently updated number retained as the primary number. Phone numbers provided prior to the most recent one will be retained in the client's history.

**Clients Listing
More Than One
Phone Number**

If a client lists more than one phone number on a form or verification submitted to the DTA, case managers must cold call all phone numbers provided on submitted documents, unless the client has Heightened Level of Security (HLS). If client contact is unsuccessful, or the client has HLS, the case manager must enter the first phone number listed on the document on BEACON. A detailed Narrative must be entered indicating that the best number to reach the client at could not be confirmed at that time. Once client contact is made, the client must be asked what the best number to reach them at is.

Forms are in process of being revised to request the best phone number at which to reach a client.

**Staff
Responsibilities**

Whenever Department staff are speaking with a client, either in-person or by phone, they must take the opportunity to ask the client what the best number to reach them at is and update the client's case record accordingly.

**Schedule Timely
Appointment
Action
(SNAP-only)**

BEACON automatically creates the Schedule Timely Appointment Action to follow up when an interview is not scheduled timely or was scheduled but not completed for a reason that does not appear to be the client's fault. When a case manager is assigned this Action, s/he must cold call the client to complete the interview and if unable to reach the client, schedule an interview appointment. A Notice of Missed Interview (NOMI) must not be sent. An Online Guide page has been added to outline processing procedures for the Schedule Timely Appointment Action.

**Prepaid
Phones**

Prepaid phones are an eligible expense to qualify for the phone Standard Utility Allowance (SUA).

Forms will be revised to indicate that prepaid phones are an allowable expense at a later date.

As with other utility expenses, this expense can be verified through a signed self-declaration.

**New Online
Guide Page:**

Topic: Business Process (BP)
Book: Procedures (BP)
Chapter: Processing Procedures
Page: Schedule Timely Appointment Action

**Revised Online
Guide Pages**

Numerous Online Guide pages have been updated to reflect these technical changes.

**Removed
Pages:**

The following pages have been removed and consolidated with other pages related to phone procedures:

Topic: Business Process (BP)
Book: Procedures (BP)
Chapter: Phone Procedures
Page: Verifying Caller Identity

Topic: DTA Assistance Line
Page: Screen Pop

Questions

If you have any policy or procedural questions, after conferring with the appropriate TAO personnel, please have your Systems Information Specialists or TAO management email the DTA Mailbox.

Systems issues should be directed to the Systems Support Help Desk.
