



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

CHARLES D. BAKER
Governor


MARYLOU SUDDERS
Secretary

KARYN POLITO
Lieutenant Governor

JEFF McCUE
Commissioner

**Online Guide Transmittal 2018-53
August 24, 2018**

To: Department of Transitional Assistance Staff

From:  **Paul Sutliff, Assistant Commissioner for Programs and Field Operations**

Re: Business Process: Updates to Procedures for Document Handling

Overview

In an effort to streamline the Online Guide, the Business Process topic is being reorganized for easier navigation. Many of the pages will be consolidated, moved or deleted. A new chapter entitled Document Handling is being added. Obsolete procedures and information will be removed.

Purpose

The purpose of this transmittal is to advise staff about the

- reorganization and updating of the Business Process topic;
- new Document Handling chapter; and
- removal of two folders from Policy Online – Business Process Redesign (BPR) and Electronic Document Management (EDM).

In addition, classifications of document status are being updated so that clients may more easily understand what is happening with their documents when viewed through DTA Connect and other platforms.

**Obsolete
Memos**

The following Operations Memos are now obsolete:

- Operations Memo 2013-61, *Electronic Document Management – Release 1*;
 - Operations Memo 2013-63, *Earned Income Tax Credit (EITC), Child Tax Credit (CTC), Massachusetts Earned Income Credit (EIC), Child Care Assistance and Electronic Document Management (EDM) Mailing*;
 - Operations Memo 2014-3: *EDM Release 1 – EDMC Mail Facility Processing Responsibilities*;
 - Operations Memo 2014-3A: *EDM Release 1 – DTA myWorkspace Functionality*;
 - Operations Memo 2014-3B: *EDM Release 1 – DTA Clerical Staff Responsibilities*;
 - Operations Memo 2014-3C: *EDM Release 1 – Case Manager and Central Office Business Responsibilities*;
 - Operations Memo 2014-26, *Electronic Document Management (EDM) Release 1.1*;
 - Operations Memo 2014-33 A, *Electronic Document Management (EDM) Release 2.0 – Clarifications*;
 - Operations Memo 2014-58, *TAFDC, EAEDC and SNAP – Back-Scanning of Permanent Verification and Indexing of All Documents by Household Member*;
 - Operations Memo 2014-61, *TAFDC, EAEDC and SNAP – Back-Scanning Update*; and
 - Operations Memo 2014-66, *TAFDC, EAEDC and SNAP: Business Process Redesign (BPR) Overview*.
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**Obsolete
Folder on
Policy Online,
BPR**

The Business Process Redesign (BPR) folder on Policy Online is now obsolete. As a result, the following documents are now obsolete:

Training Material:

- Business Process Redesign Process Training (Issued 10/1/2014);
- DTA BEACON, Assistance Line Training & Effective Work Strategies for SNAP Workers (Issued 10/6/2014);
- Sandbox Guide Attachment - Cash (Issued 10/8/2014);
- Sandbox Guide Attachment - SNAP Case Manager (Issued 10/8/2014);
- Sandbox Guide Attachment - Front Office (Issued 10/8/2014);
- Sandbox Guide Attachment - SNAP Supervisor (Issued 10/8/2014);
- BPR Mailing Attachment (Issued 10/10/2014);
- TAO Support Teams (Issued 10/20/2014);
- BPR Rollout Support Training (Issued 10/23/2014); and
- Quick Reference Tutorial - Cisco Desktop Agent (Issued 10/23/2014).

Desk Aids:

- Cash Desk Aid, and
- SNAP Desk Aid.

Job Aid:

- Quick Reference Guide on Using the New Phone System - Cisco Desktop Agent (Issued 10/16/2014).

Questions and Answers:

- Business Process Redesign Q & A Document (Issued 10/24/2014).

In addition, the following forms have been removed from the BPR folder but are now available in Online Forms:

- DTA Registration Face Sheet (English);
 - DTA Registration Face Sheet (Spanish);
 - Notice of Late Document (English);
 - Notice of Late Document (Spanish); and
 - Returned Document Notice (English).
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**Obsolete
Folder on Policy
Online,
EDM**

The Electronic Document Management (EDM) folder on Policy Online is now obsolete. As a result, the following documents are now obsolete:

Job Aid:

- Steps to Locate and Prepare Verifications for Scanning from Case Files (Issued 9/18/2014).

EDM Emails:

- Commissioner's EDM Email Message;
- PPER Email 2014-1: DTA myWorkspace Production Access (Issued 1/31/2014);
- PPER Email 2014-14: Electronic Document Management (EDM) Release 2.0 (Issued 5/19/2014); and
- PPER Email 2014-15: EDM Release 2 Clarification of Documents Considered Urgent (Issued 5/19/2014).

EDM Webinars:

- EDM Release 1: Refresher Webinar (recorded 4/14/2014).

EDM Videos:

- Reassigning a Task to Another Office;
 - Reassigning a Task within your TAO;
 - Snipping Tool: An Alternative to Printing;
 - EDM Documents and Resources;
 - Logging In, Modifying a Password, and Using the Forgot Password Function;
 - Processing a Task with a Single Document;
 - Processing a Task with Multiple Documents;
 - Thumbnail Page Viewing in myWorkspace;
 - Updating Indexing Information in myWorkspace; and
 - Window Snapping.
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**Obsolete
Folder on Policy
Online,
EDM
(continued)**

Training Materials:

- EDMC Training Tool PowerPoint and (PDF);
- EDM Project Team;
- DTA EDM Case Manager Training;
- DTA EDM Clerk Training;
- DTA EDM Training Sessions PowerPoint;
- EDM Frequently Asked Questions (FAQs);
- EDM Champions of Change TAO Pre-Implementation Checklist;
- EDM Champions of Change TAO Post-Implementation Monitoring
- EDM Combo Codes in SSTA Job Aid;
- Opening and Using Multiple Internet Explorer Windows Job Aid;
- DTA myWorkspace (MWS) User Guide; and
- DTA Electronic Document Management (EDM) – Release 2 Processes and Procedures PowerPoint.

Posters/Flyers:

- A New Year – A New Way of Doing Business (English);
- A New Year – A New Way of Doing Business (Spanish);
- Staff Poster: Electronic Document Management;
- Electronic Document Management (EDM) and You! (English and Spanish);
- EDM Release 2 Poster (English);
- EDM Release 2 Poster (Spanish);
- EDM Release 2 Flyer (English); and
- EDM Release 2 Flyer (Spanish).

DTA Document Cover Sheet:

- DTA Document Cover Sheet; and
- DTA Document Cover Sheet (fillable).

DTA EDMC Packing Slip(s):

- DTA EDMC Packing Slips: Not Processed; and
 - DTA EDMC Packing Slips: Processed.
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Guide Pages**

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Book: Procedures
Chapter: Document Handling
Page: Guidelines for Scanning Documents to the DPC

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Topic: Business Process (BP)
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Topic: Business Process (BP)
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Topic: Business Process (BP)
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**Obsolete Online
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Page: Re-indexing Misidentified Documents

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Page: Re-indexing Misidentified Documents

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.
