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Operations Memo 2012-11
February 9, 2012

To:	**Department of Transitional Assistance Office Staff**
From:	**Stephanie Brown, Assistant Commissioner for Policy, Program and External Relations**
Re:	**TAFDC, EAEDC and SNAP – Additional Functionality Changes in BEACON Build 44.6**

Purpose of Memo

Effective with BEACON Build 44.6, scheduled for February 6, 2012, several changes in functionality occurred. This Operations Memo:

- highlights and explains the new functionality to TAO staff; and

- provides procedures for using this new functionality.

These changes were made at the request of TAO staff.

Letters Functionality Changes

Letter Request Page:

An Information popup button following the (Requestor) Name field has been added. The (Requestor) Name field will default to the name of the logged-on case manager.

When that case manager clicks the Information popup button, the Worker Search popup page will appear. A different case manager's name within the case manager's TAO can be selected and used as the sender of the letter.

Schedule Appointment Functionality Changes

Schedule Appointment changes:

The client's phone number (in a hierarchy of cell, home and work) was added to the Schedule Appointment popup to the right of the client's SSN.

If a case manager double clicks on the Client's name in the Calendar Master Schedule, the Schedule Appointment popup field will be displayed, allowing the appointment to be easily rescheduled or cancelled.

Narrative Tab Changes

Several changes have been made to the Narrative tab.

Two sub-tabs will now be displayed when the Narrative tab is clicked: Search and Scratchpad.

Search Sub-tab:

When case managers click the Narrative tab, the Search sub-tab will be the default view containing several enhancements:

- A Narrative column was added to the outline field. The Narrative column will preview the first 66 characters of the text from the Notepad popup page. The full text of the narrative can be viewed by clicking (highlighting) the narrative and clicking the *Details...* button.

- If the narrative text was copied and pasted from a source with special HTML characters the Narrative preview will only display the words: *...special text...* The full text of the narrative can be viewed by clicking (highlighting) the narrative and clicking the *Details...* button.

- A *Copy to Scratchpad...* button was added to the Search sub-tab. This allows the case manager to select an existing saved narrative and modify it. To use this functionality, click (highlight) a narrative text that needs to be modified. Click the *Copy to Scratchpad...* button. Edit the text and click the Save icon in the upper left hand side of the sub-tab. The original narrative will be unchanged and display the original date it was entered on the Narrative tab. The edited narrative will be saved as a new entry and display the current date entered.

- TAO Directors will be assigned a User Capability of Narrative Updater to allow saved narrative text to be changed.

Narrative Tab Changes (continued)

Scratchpad Sub-tab:

The new Scratchpad sub-tab will be used as a temporary writing area to collect all narrative text entered during any case maintenance or case reevaluation session. The text can be changed if the case manager leaves the tab without saving the text to work within the case and returns to the sub-tab. An asterisk will appear on the Narrative and Scratchpad tabs when the text has not been saved.

A save in this sub-tab:

- stores the temporary narrative text to the database;

- clears the temporary writing area; and

- displays the text on the Search sub-tab.

    Important: If the case manager exits out of the case without saving the Narrative, the following message will display: "If you exit the ECF without saving the Narrative Scratchpad, your entry will be lost. Do you wish to save your changes?" The case manager must answer "Yes" or "No."

TAO View Navigation Change for Certain Views

Certain views can be sorted by clicking the title bar of the column the case manager wishes to sort.

In this Build, if a certain list of views is sorted by the case manager, who then leaves the view by selecting one of the icons on the tool bar, and returns to the view by clicking the *Back* button from the page, the view will remain sorted. The Views that have this new functionality are:

Daily Priority Actions:

- ✓ Documents Sent For Past Week
- ✓ Interview Wrapup - Pending Authorization
- ✓ Monthly Reporting Status
- ✓ Outstanding Participation Forms
- ✓ Pending Application/Reinstatements

**TAO View
Navigation
Change
(continued)**

- ✓ Pending EBT Card Request
- ✓ Pending AUs (Web Applications) - CEU Tracking
- ✓ Reevaluation Due
- ✓ Reevaluation Due - Interim Report
- ✓ Verifications Due
- ✓ Web Applications

Assistance Units Lists

- ✓ Active by Grantee Name

Case managers can use the *Refresh* button to unsort the view.

Questions

If you have any questions, please have your Hotline designee call the Policy Hotline.

Systems questions should be directed to the EOHHS Customer Service Center.