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Department of Transitional Assistance

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Operations Memo 2013-59
November 21, 2013

To: **Department of Transitional Assistance Staff**

From: **Lydia Conley, Acting Assistant Commissioner for Policy, Program and External Relations**

Re: **BEACON 3.0 Home Page and Tools**

Overview

BEACON 3.0 was implemented on June 10, 2010. BEACON 3.0 has the same practical application as BEACON 2.0 with some added capabilities. Unlike its predecessor, BEACON 3.0 is a web-based application. A number of improvements have been made to the application, including:

- a new Home Page;
- new Tools to assist all users;
- Eligibility Explorer has been replaced by the Electronic Case Folder (ECF);
- the ESP Services workflow has been redesigned;
- windows are called pages and have a new look and feel; and
- many case maintenance activities are broken out as their own workflow types.

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Purpose of Memo

The purpose of this Operations Memo is to introduce the BEACON 3.0 Home Page, to identify BEACON 3.0 Tools, and to advise staff that the Department no longer restricts the collection of client's email addresses. All references regarding the restriction on collecting email addresses has been removed from the text messages section of page 5, and the clients email address section on page 8.

With BEACON 3.0 implementation, all BEACON 3.0 Tools are available to staff. Although all Tools are available for use, some Tools will not initially be used. This information can be found in the BEACON Tools section of this memo.

BEACON 3.0 Home Page

With the re-platforming of BEACON 2.0 to BEACON 3.0, a number of changes and enhancements have been made. The most notable change is that BEACON 3.0 is a web-based system and is accessed through the MAGNet Network. The BEACON 3.0 Home Page replaces the multiple menu structure associated with BEACON 2.0, and is constructed of three main areas: a Tool Bar, the My Office Tab and the Content Pane. The Home Page displays all pertinent caseload information at a glance.

Under My Office Tab:

- the Client Search capability replaces Client List;
- views can be accessed;
- appointments can be made;
- "What if" calculations can be done;
- AU mass assignments can be made; and
- the fraud referral process can be accessed

The Content Pane is sectioned into "portlets" each displaying a particular function associated with the application.

- Today's Appointments;
- Sticky Notes;
- Useful Links (Actuate Report Viewer, Training Online, Blue Book, etc.);

BEACON 3.0 Home Page (continued)

- Google search;
- Text Messages; and
- Organizer (displaying System's Messages and My Tasks).

BEACON 3.0 Functionality

With BEACON 3.0 implementation, users are introduced to enhanced functionality developed to positively impact the day to day operations of TAO staff. This new functionality includes the following:

- Enhanced appointment functionality;
- Google Search capability into DTA documents;
- Text Messaging;
- Enhanced Narrative functionality;
- My Tasks functionality;
- Sticky Notes on the Home Page;
- Using the User Staff Search under Views Tools;
- The ability to export lists to Excel from certain pages, views and tools; and
- Collecting a Client's Email Address.

Note: The Appointments and the Narrative functions are required to be used by all users as mandated in BEACON 3.0 Training.

BEACON Tools: Appointments

The enhanced Appointments functionality allows the user to create, update, view, and print appointments. The following features are available under the Appointments menu selection:

- Calendar;
- Appointment Book; and
- Print Appointments.

BEACON Tools: Appointments (continued)

The BEACON 3.0 Appointments tool is similar to the BEACON 2.0 Appointments feature with a number of enhancements. The BEACON 3.0 Appointments tool has the:

- ability to schedule appointments with any BEACON 3.0 user by choosing “General” for Appointment type on the Schedule Appointment page;
- ability to view scheduled appointments by the day, week, and month;
- ability to view scheduled appointments through a customized Master Schedule view on the Appointment Calendar page for all staff within a TAO; and
- ability to export data to an Excel spreadsheet.

The Appointments tool **must** be used by all DTA staff who schedule appointments for clients. The customized Master Schedule view allows viewing and tracking appointments of all case managers in a particular TAO. This is a significant benefit to clerical staff in each TAO due to the capability to view each case manager’s appointments so that clerks can notify walk-in clients of any case manager’s schedule for the day.

Google Search Engine

The Home Page Search field allows the user to enter search criteria and perform a Google Search of information contained in the following DTA documents:

- Regulations;
- Field Operations Memos;
- The Online Guide (once available);
- New Initiatives Memos;
- Transitions; and
- TAO Emails – Special Procedures.

The Google Search engine will be accessible from all workflow pages by clicking on the Policy button. This tool affords staff direct access to relevant DTA documents.

Text Messages

The Text Messages tool is an internal email system used to communicate with other users. The Home Page provides data on the number of text messages received, sent, and deleted. The Text Messages page can be accessed from the Content Pane as well as from the Text Messages icon on the toolbar. The Text Messages page provides standard email functions, such as:

Text Messages (continued)

- creating a new message;
- deleting a message;
- replying to a message;
- replying to all;
- forwarding a message;
- refreshing a message; and
- printing a message.

In addition, there is a Client Select feature available with Text Messaging. This will allow the user to create and email a shortcut to a client's Electronic Case Folder (ECF).

Note: Text messaging is limited to internal business purposes only. Staff **may not use** this tool to text individuals external to DTA.

Narrative Tab

The Narrative tab accessed from the ECF is similar to the BEACON 2.0 Narratives tab with the following enhancements:

- the ability to add narratives directly from the workflow pages;
- expanded Search capability: search for particular narratives based on keywords, from and to dates, workflow pages;
- the ability to export the narrative to a document to be printed and/or saved; and
- the ability to attach documents, such as a File from any saved Drive or a Notice from BEACON 3.0 to a narrative by choosing *Attachment, File* or *Notice* on the Narratives page.

The benefit of the Keyword search capability allows case managers to type in a Keyword, such as "absence", and all Narrative tab entries containing that word are displayed.

Important: When entering, changing and/or deleting data in the ECF, the Narrative tab **must be** annotated with each action taken.

My Tasks View

My Tasks, is similar to the BEACON 2.0 Reminders functionality located on the TAO Office Explorer menu bar, and allows users to create, update and view tasks or a "to do" list. It also has the ability to set current and future "to do's."

Tasks, for which a reminder date and time is set, will be displayed on the Home Page. To enable the reminder "alarm clock" go to:

- the reminder date and time fields;
- click on the calendar icon; and
- select a date and enter a time for the reminder alarm.

At the appropriate date and time, a reminder popup will be displayed.

Two new pages are associated with the My Task tool:

- Tasks; and
- Tasks Details

My Tasks has all of the functionality associated with BEACON 2.0 Reminders with the following additional functionality:

- Due Date;
- Status (Pending, Completed. etc.);
- Priority (Low, Normal, High);
- Reminder indicator;
- Reminder Date and Time;
- Ability to associate a client to a task; and
- Ability to navigate to a client's ECF by clicking on the Client icon.

Sticky Notes

Sticky Notes are available to use on the Home Page. This function allows the user to add notes for his/her own use. In addition, Sticky Notes are also available to use in each client's ECF for case specific notes.

User Staff Search

The User Staff Search menu selection found under the View Tools selection on the My Office tab allows a user to:

- search for users;
- identify the staff, colleagues, and profile of a user; and
- launch into their Staff or Colleague's Home Pages.

Case managers covering their colleague's cases are able to access that person's Home Page functionality.

Saving an Export to an Excel Spreadsheet

BEACON 3.0 has the added capability of allowing a user to export information from BEACON 3.0 into an Excel spreadsheet. Most pages with the exception of all BEACON 3.0 workflows display the Excel icon on the page. This icon is used to export the data displayed on a page to an Excel spreadsheet. The following lists some, but not all of the information that can be exported:

- Clients;
- Referrals;
- Accounts;
- Obligations;
- SSA (Social Security Administration) cases;
- Views;
- Appointments; and
- Accounts Receivable (AR).

Spreadsheets exported from Excel can be printed and/or saved to the user's Home drive. As this is client-sensitive data, it should not be saved to a user's hard drive or removed from the premises. This tool should only be used by individuals who have been trained on how to use Excel.

Note: If you have any questions about confidentiality please refer to: *Confidentiality of Personal Information* on DTA Online, *Legal, Memos Related to Employee Conduct* or contact the Legal Division.

Client's Email Address

BEACON 3.0 collects email addresses for all household members on:

- the Email – RFA (Request for Assistance) page in the RFA section; and
- the Email page in the Household Composition page.

Obsolete Memo

This Operations Memo Obsoletes 2010-33*: BEACON 3.0 Home Page and Tools.*

Questions

If you have any questions, please have your designee call the Systems Help Desk at (617) 348-5290.