



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

DEVAL L. PATRICK
Governor

JOHN W. POLANOWICZ
Secretary

STACEY MONAHAN
Commissioner

**Operations Memo 2014-33
April 24, 2014**

To: Department of Transitional Assistance Staff

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

Re: Electronic Document Management (EDM) Release 2.0

Overview

Beginning April 28, 2014, DTA will implement Electronic Document Management (EDM) Release 2.0. There are three components in this release.

The first component affects the way clients deliver documents at TAOs. Clients will no longer use drop boxes located at the TAOs to deliver documents. Instead, they will be strongly encouraged to mail or fax documents to the EOHHS Electronic Document Management Center (EDMC) in Taunton. Documents that are still received at TAOs will either be processed on site or sent to EDMC for scanning. This component will be phased in over a period of four weeks beginning April 28, 2014 and ending May 30, 2014.

The second component of the Release consists of changes to DTA myWorkspace (MWS). This component will take effect on April 28, 2014.

The third component consists of the creation of a cover sheet to support faxing of client documents on April 28, 2014 and changes to notices effective May 5, 2014.

Purpose

The purpose of this memo is to inform DTA staff of changes to business processes, DTA myWorkspace and notices in EDM Release 2.0.

Obsolete Memo

Operations Memo 2012-7, *TAFDC, EAEDC, SNAP, Fax to Email Pilot Project* is now obsolete.

Changes to Client Document Delivery

With implementation of Release 2.0, clients will deliver documents to DTA using the following methods:

- Mailing document(s) to the EDMC using one of the three addresses identified in Operations Memo 2014-3, *EDM Release 1 – EDMC Mail Facility Processing Responsibilities*;
- Faxing documents to the EDMC at (617) 887-8765;
- Hand delivery of documents to a case manager when applying for benefits in person, or coming into the TAO for a scheduled appointment; or
- Hand delivery of documents when a client comes in to the TAO for an unscheduled visit.

Note: Drop-off boxes will no longer be located in TAOs. Clients must use one of the methods listed above when delivering a document.

Important: Fax to email will be discontinued on April 28, 2014.

Schedule for Fax Document Delivery Changes

Effective with Release 2.0, faxes will no longer be directed to individual TAOs or some Central Office Business Units. Effective the dates identified below, they will be redirected to the new EDMC fax number, (617) 887-8765. Client notices will reflect this new EDMC fax number with implementation of BEACON Release 46.3 scheduled for May 5, 2014.

Date	TAO or Central Office Business Unit
April 28, 2014	Brockton; Centralized Eligibility; Chelsea; Centralized SNAP/SSI Office; Lawrence; and Worcester.
May 5, 2014	Dudley Square; Fall River; Fitchburg; Framingham; Greenfield; Division of Hearings; Holyoke; Hyannis; Lowell; Program Integrity Division; Malden; New Bedford; Newmarket Square; North Shore; Pittsfield; Plymouth; Southbridge; Springfield Liberty; Springfield State; and Taunton.

Schedule for Client Hand Delivery Changes

Except when applying for benefits and at scheduled appointments, procedures for hand delivery of documents will change effective the following dates:

Date	TAO or Central Office Business Unit
May 5, 2014	Brockton; Centralized Eligibility; Chelsea; Centralized SNAP/SSI Office Lawrence; and Worcester.
May 12, 2014	Fall River; Hyannis; New Bedford; Plymouth; and Taunton.
May 19, 2014	Dudley Square; Fitchburg; Framingham; Newmarket Square; and Southbridge.
May 27, 2014	Greenfield; Holyoke; Lowell; Malden; North Shore; Pittsfield; Springfield Liberty; and Springfield State.

Assessment of Hand Delivered Documents

All hand delivered documents must be reviewed to determine the urgency of submission for processing. The only documents that will be considered for urgent processing are SNAP applications, SNAP recertifications and SNAP IRs, and all documents presented with them at the time of submission. All other documents will be considered non-urgent and will be scanned at the EDMC prior to processing at the TAO.

To be assigned an Urgent status, the benefit end date (or in the case of a SNAP application, the application due date) must be within 5 calendar days or fewer from the date the document is hand delivered. These dates can be found on the cover letter for SNAP recertifications and Interim Report forms, and on the VC-1 for SNAP applications.

Example: Mary Smith brings her SNAP recertification and all verifications required to the TAO on May 1st. Her benefit end date is May 4th. Mary has four days before her benefits end. Her documentation is designated Urgent by the Waiting Area Coordinator (WAC) and must be processed in the TAO by the assigned case manager before being batched and sent to the EDMC.

Note: Case managers must continue to conduct SNAP recertifications in accordance with current procedures.

Hand Delivery of Documents

Triage Area

Effective with the issuance of this memo, each TAO must designate a triage area in the waiting room to be staffed by their WAC with administrative clerical support for assistance. This area must be supplied with two boxes, one marked Urgent and one marked Non-Urgent. Documents hand delivered by clients will be evaluated by the WAC to determine their status: Urgent or Non-Urgent.

- Urgent documents will be placed in the Urgent box and will be processed at the TAO prior to delivery to the EDMC.
- Non-Urgent documents placed in the Non-Urgent box will be batched and shipped to the EDMC for scanning and processing through DTA myWorkspace (MWS).

Important: WACs are staff assigned to coordinate the waiting area as their primary responsibility. If a WAC is unavailable, a supervisor must assume that responsibility.

When a client comes to the TAO to conduct business, s/he must first be seen at the triage desk for the WAC to assess the purpose of client's visit. If the client wishes to hand deliver a document, the WAC must:

- review the document for completeness (to the best of his or her ability), and advise the client of any missing information;
- provide the client with the *DTA Document Cover Sheet* to complete Part 1 (see Attachment A), and direct him or her to use the copier to copy original documents as needed. Cover sheets must be accessed from the Online Forms folder in Policy Online; and

Important: An original cover sheet **must** be printed out for each use. Cover sheets must **not** be photocopied as the bar code will not be readable.

- offer a business reply envelope and give the client the statewide fax number (617-887-8765) informing him or her that in the future the more direct route for DTA to receive documentation is via the EDMC.

Reminder: DTA staff must assist clients in understanding these procedures and the contents of any DTA document. This includes the provision of interpreter services as described in Operations Memo 2013-11, *Department Interpreter Services Procedures* and the provision of accommodations described in Field Operations Memo 2010-30, *Department Obligations Under the Americans With Disabilities Act (ADA): TAFDC, EAEDC and SNAP*.

Note: Do not date stamp original permanent documents.

**Hand Delivery
of Documents**
(continued)

If the hand delivered document is a completed SNAP application and it is deemed Urgent by the WAC, and the applicant does not wish to stay and meet with a case manager, the WAC will place the document in the Urgent box and follow current office protocols for assigning applications.

After assignment and receipt of the application, the case manager will input the information into BEACON and complete all of the necessary application tasks in accordance with current procedures. Once the case manager completes the initial application processing responsibilities, i.e., inputting information in BEACON, issuing the VC-1, etc., s/he must prepare the documents to be transported to the EDMC.

In the same situation as above, if the applicant would like to see a case manager, the WAC should send the applicant with the hand delivered application to the front desk clerk who will assign a case manager to come and assist the client, based upon office protocol.

If the hand delivered document is a SNAP recertification or an IR, and it is deemed Urgent, the WAC will place the document in the Urgent box and follow current office protocols for handling drop-off recertifications and IRs.

Upon receipt of the recertification or IR, the case manager will input the information into BEACON and complete all of the necessary recertification or IR tasks in accordance with current procedures.

For all Urgent documents, as soon as the case manager completes the initial processing responsibilities, i.e., inputting information in BEACON, issuing the VC-1, etc., s/he must complete Part 2 of the *DTA Document Cover Sheet*, date stamp both the cover sheet and the first page of each document in the lower right-hand corner and prepare them for shipment.

Note: If all of the documentation is available to process the application recertification, and/or the IR, and if all of the processing tasks have been completed, the case manager must wrap up the case in BEACON for supervisory review and sign-off. The supervisor must review all of the documentation needed to sign-off on the case. It is the supervisor's responsibility to batch these processed documents for shipment to the EDMC.

Preparation for Document Transport

To prepare documents for transport to the EDMC, the WAC, supervisor or case manager will:

- complete Part 2 of the *DTA Document Cover Sheet* (see Attachment A), and date stamp all appropriate documents;
 - paper clip all documents together with *the DTA Document Cover Sheet* on top; and
 - place all documents in the appropriately marked box - Urgent or Non-Urgent. A courier will pick up the boxes each business day for next-day delivery to the EDMC.
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Changes to DTA myWorkspace

The following changes have been made to DTA myWorkspace:

- New documents will no longer link to a 'Processed' task;
- Folder IDs will no longer be identical to the AP ID. The Folder ID will be displayed in the Search task screen; and
- The Task ID in the Assignment Summary field of the Task Summary screen will now be known as the Folder ID.

The following office names have changed in DTA myWorkspace.

- *Centralized SNAP – SSI Office* replaces Malden Centralized SSI Office; and
- *Central Office – FIDMU* replaces Central Office – Data Matching Unit.

Documents that have been processed at a TAO or in a Central Office Business Unit and then subsequently scanned will be indexed as follows:

- Processed documents will come into DTA myWorkspace as a task with a status of 'Processed;' and
- 'Processed' tasks will not link to any existing tasks.

If staff open a Task that was created from a processed document, they will be able to view the following details in the Task Summary page under Workflow Information:

Status will be 'Processed;'
Date Received will be 'the date indexed;'
Disposition will be 'Processed;'
Assigned To will be 'SYSTEM;'
Disposition Date will be 'the date specified during indexing;'
Document Processed? will have a ✓.

**EDMC
Returned Mail
Protocol**

A returned mail protocol has been developed to handle all BEACON-generated undeliverable mail. The process closely mirrors the Returned Mail process the Department currently employs for returned bulk mail. See Operations Memo 2013-13A, *Returned Mail Processing – Automation of Central Office Returns* for more information.

Questions

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