



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


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**Operations Memo 2014-3 A
January 31, 2014**

To: Department of Transitional Assistance Staff

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

Re: EDM Release 1 – DTA myWorkspace Functionality

Overview

Effective with BEACON Build 46.1, DTA will implement Electronic Document Management (EDM), Release 1. Release 1 focuses on implementing EDM and DTA myWorkspace (MWS) to facilitate the centralized scanning and distribution of postal mail. The implementation is being introduced through five Operations Memos that provide an overview of the project and detail centralized mail processing, MWS functionality, clerical, case manager and Central Office staff responsibilities, respectively.

The vast majority of documents that are currently mailed to TAOs and Central Office by applicants and clients (hereafter referred to as clients) such as applications, recertifications and verifications, will be routed to the EOHHS Electronic Document Management Center (EDMC) in Taunton. The EDMC mail clerks will scan and index documents and make them available in MWS to clerks in the TAOs and Central Office Business Units, who will assign the incoming documents to appropriate staff, as is the current practice.

This is the third in a series of five Operations Memos about EDM, Release 1. This memo provides detailed instructions on the day-to-day processing of postal mail upon implementation of Release 1.

**Overview
(continued)**

Operations Memo 2013 – 61, *Electronic Document Management – Release 1*, (issued 12/12/2013) introduced the EDM project to DTA staff.

Operations Memo 2014 – 3, *EDM Release 1 – EDMC Mail Facility Processing Responsibilities* (issued concurrently with this memo) advises staff of the EDMC mail clerk responsibilities and the relationship of MWS to the EDM process.

Operations Memo 2014 – 3 B, *EDM Release 1 –DTA Clerical Staff Responsibilities* (also issued concurrently with this memo), transmits procedures to be followed by DTA clerical staff as they relate to the EDM project, Release 1.

Operations Memo 2014 – 3 C, *EDM Release 1 –DTA Case Manager and Central Office Business Unit Responsibilities* (also issued concurrently with this memo), provides case managers and Central Office Business Unit staff with guidance for processing tasks retrieved from MWS.

**Purpose of
Memo**

The purpose of this memo is to provide guidance to DTA users on logging into MWS and processing documents (tasks) that have been scanned and uploaded by the EDMC mail clerks.

This Operations Memo will describe the basic MWS functionality. However, to review functionality in greater detail, access the MWS User Guide found on the Electronic Document Management (EDM) page in Policy Online.

**DTA
myWorkspace**

MWS is web-based software that has been selected to house and transmit the documents processed at the EDMC. It affords DTA the ability to automate document sharing, task management and workflow.

MWS will be accessed via a hyperlink that will be issued to all DTA MWS users and consistent with existing protocols for BEACON access, security roles will be assigned based upon user responsibilities.

Prior to release, Policy Program and External Relations (PPER) will issue an all-staff email to advise that Champions of Change will assist staff to set up their MWS production accounts. Subsequent to that email, Champions of Change and Train and DTA trainers will begin helping DTA staff set up their MWS accounts.

**DTA
myWorkspace
(continued)**

To logon to MWS:

- click the hyperlink to MWS; this will bring the user to ‘Reset Password.
- in the ‘Code field,’ enter the password reset code identified in the PPER email;
- in the ‘Password field,’ enter the new password;
- in the ‘Confirm Password’ field confirm the new password; and
- select the reset button;

Note: Password naming conventions for MWS are identical to those for BEACON. **Passwords require eight characters, including at least one number, one special character and one capital letter.**

Once the password is successfully reset, the Reset Password screen will display the following message: “Password Updated Successfully Please Login and try.”

Note: The login instructions imply that a user has been issued an initial password. However, there will be some staff who have never received an initial MWS password. These instructions should be followed for those staff as well.

The user must:

- select Login. The Welcome to DTA MyWorkspace screen will display;
- type the welid in the ‘User Name’ field;
- type the new password in the ‘Password’ field; and
- select Log In.

This will bring the user to the MWS home screen. From this screen, users can access those tasks (documents) assigned to him or her as well as all tasks statewide.

**DTA
myWorkspace
(continued)**

Once a document is scanned by the EDMC mail clerks and loaded into MWS, it is marked as a ‘task.’ A user navigates in MWS by clicking on one of the three tabs:

- *myWorkflows*;
- *Search Tasks*; and
- *Profile Edit*.

The *myWorkflows* tab has two sections:

- *myMetrics*; and
- *myWorkflow*.

Under the *myWorkflow* section are two sub-tabs:

- *Active*; and
- *Completed Today*.

myMetrics displays the number of tasks assigned to the user by status; i.e., Assigned, In Process, Processed and Hold.

Assigned: tasks have been assigned to a user using the ‘Deliver To’ button;

In Process: tasks that are ‘In Process’ are currently being worked on by the assigned user after using the ‘Work Task’ button. These tasks are in the process of being dispositioned. If they are not dispositioned before the user logs out of MWS, the status will change to ‘Hold.’

Processed: the user has used all relevant information found in the document(s) and disposed of the task using the ‘Complete Task’ button;

Hold: tasks that are on ‘Hold’ have been partially processed by the assigned user (by using the ‘Work Task’ button) but have not yet been disposed. ‘Hold’ will automatically appear for tasks ‘In Process’ when a user closes or logs out of MWS.

**DTA
myWorkspace
(continued)**

Another user may reassign or self-assign tasks at any time, as long as the task is not 'In Process.'

myWorkflow is the section that displays the tasks assigned to each user. It displays the Assigned, In Process, Processed, Hold and Completed detail related to each task tabulated in *myMetrics*.

The fields associated with *myWorkflow* are:

- Folder ID – unique identifier for each task;
- Task Category – the group of a type of document;
- Document Type – the document that resides in the task; e.g. SNAP Application;
- Release Date – to be used in a future release of EDM;
- Date Received – date the document(s) was received at the EDMC;
- Office – Office to which the task is associated;
- AP ID;
- Last Name (of client);
- First Name (of client); and
- Status (of the task);

Search Tasks allows the user to search for a specific task (document) by certain demographic information; i.e. Last name, First Name, AP ID, SSN, Date of Birth, Folder ID, Status, Office, Task Category, Disposition, Assigned To, Date Received From, Date Received To, Disposed Date From, and Disposed Date To.

Profile Edit allows the user to change their password.

Important: The forward and back buttons found in the upper-left-hand corner of the Internet Explorer browser should not be used to navigate as they have no functionality in MWS.

For more detailed MWS instructions go to the Electronic Document management (EDM) page on Policy Online and access the MWS User Guide.

**Contingency
Plan**

If MWS is down in any TAO, the Taunton EDMC will email each Systems Support liaison the scanned documents for their office as an email attachment in Outlook.

If the Taunton EDMC is down, all documents will be sent via courier to Charlestown (which is the backup facility to the EDMC in Taunton) and processed accordingly.

**EDM Landing
Page**

An EDM page has been added to Policy Online, which contains relevant Operations Memos, a MWS User Guide, training documentation, emails, and marketing materials.

**Employee
Compliance
Reminders**

Once implemented, EDM will be a tremendous asset to staff and clients. EDM introduces new technology to assist the staff in carrying out the Department's work; however, existing legal and professional obligations, including those regarding client confidentiality and conflict of interest remain unchanged. Staff are reminded that Department employees have obligations under the law and under their respective Codes of Conduct/Professional Standards. For example, as with BEACON, you may not access a task on MWS unless you are authorized to do so. Employees are also obligated to follow the Department's internal controls and its policies governing professional conduct. It is the responsibility of each Department employee to become familiar with these codes, controls and policies.

Note: Memos governing employee conduct, including but not limited to, staff conduct relating to privacy; conflict of interest; fraud detection; and appropriate use of computers, internet, email and voicemail, can be found on DTA Online under Administrative Memos or under Legal in the "Memos on Employee Conduct" section.

Questions

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