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

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Online Guide Transmittal 2019-24
April 4, 2019

To: **Department of Transitional Assistance Staff**

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

Re: **Cross Program: DTA Connect Online Enhancements**

Overview

In April 2018, the Department expanded the DTA Connect capabilities beyond the mobile application and deployed DTA Connect Online at DTAConnect.com. This website improved client access by offering a simplified SNAP screening tool, an interactive online SNAP application, and access to case information for clients and contracted providers.

The Department is expanding functionalities by replicating the interactive online SNAP application at DTAConnect.com to allow clients to complete their Interim Report and Recertification processes online. This functionality is scheduled to be deployed on April 16, 2019.

Making the Interim Report and Recertification process accessible online is projected to significantly improve access for clients, allow for timely submission, and reduce interruption in benefits for those who remain eligible.

Purpose

This transmittal advises staff of changes related to DTA Connect enhancements, including:

- anticipated date for online submission of Interim Report and Recertification functionality;
- which clients may complete the online process and how they do so;
- how DTA staff will receive Interim Reports and Recertifications;
- new Datasheets for Interim Reports, Self-Declarations (during Interim Report), and Recertifications; and
- the impact on BEACON.

Who can submit online?

The online submission of Interim Reports and Recertifications will be available through DTAConnect.com; it is not available on the DTAConnect mobile app at this time. SNAP clients who are the Head of Household (including combination cases) must create a DTAConnect account and link the account to their case record to access this functionality.

The online submission of Interim Reports and Recertifications is available to all clients who log in to DTAConnect.com and are within the 45-day window from the date the paper version of the form is mailed. An alert will display to encourage the client to complete the process unless/until the client completes the process online or the workflow is initiated in BEACON.

How are Interim Reports/ Recertifications assigned?

The following Actions are being created for First Available Worker (FAW) staff to clearly identify the source of the submitted form:

- Process Online Interim Report
- Process Online Recertification
- Process Scanned Interim Report
- Process Scanned Recertification

SNAP cases that are assigned to an Economic Assistance case manager must review their Reevaluations Due View to see if a client has submitted an Interim Report or Recertification. This will be identified in the new Document Available column with a Scanned Document or Datasheet indicator.

Scanned forms will continue to be available in the Scanned Document History. Online submissions will be available as a Datasheet in Document History or by clicking the Web Datasheet icon.

> **Exception:** A Self-Declaration workflow is available for clients after submitting the Interim Report as long as the session remains active and does not log out. That section is optional. Staff will receive a separate Self-Declaration Datasheet when this workflow is completed but it will be available in Scanned Document History.
>
> Expenses that may be self-declared are included as part of the normal Recertification workflow.

Impact of Online Submission on BEACON Processing

The online submission is meant to streamline processes for staff. The Datasheets for Interim Report (including optional Self-Declaration section) and Recertification will capture all questions that were asked of the client and lists their responses.

When the Head of Household submits an Interim Report or Recertification online, the Reevaluation workflow will be initiated. Many data elements will be transferred into BEACON, but staff must pay careful attention to the datasheets to ensure that all provided data elements are updated in BEACON.

Interim Report Without Changes

When staff receive the Process Online Interim Report Action or see a Datasheet in the Reevaluations Due View and the only indicator in the workflow is on the Interview Wrapup page, that means that the client:

- did not report any changes; or
- reported changes that fall below the minimum reporting threshold, and
- appropriate program integrity checks have been passed. There aren't any outstanding matches or scanned documents available.

In that instance, staff **must not** review other pages or make external database requests. The case must be authorized with a Narrative stating: "Authorized Interim Report without changes."

Interim Report With Changes

When staff receive an Interim Report that has outstanding indicators on the workflow (other than Interview Wrapup), the entire Interim Report and Self-Declaration (if applicable) Datasheet(s) must be reviewed to ensure that the applicable fields are updated in BEACON. Only information that was reported on the Datasheet must be updated.

The Self-Declaration Datasheet is an optional attachment to the online Interim Report workflow. It is meant to capture expense information that has changed. If the client did not complete that workflow, the expenses on record must remain as part of the calculation. Reported address changes are an exception to this. Clients must update their shelter expenses to continue receiving credit if they move

Recertification

At Recertifications, staff must review all data that was in the client's case record. Clients are encouraged to submit verifications upon submission, but they are not asked to enter information about elements that require further verification, such as earned income.

If data was available in the case record and is not asked on the Recertification form, staff must follow up with the client during interview (if required), verify through available databases, or through a Verification Checklist (VC-1) if there are outstanding elements.

New Online Guide Pages

Topic: DTA Connect
Page: DTA Connect Overview

Topic: DTA Connect
Page: DTA Connect Online

Topic: DTA Connect
Page: DTA Connect Mobile App

Revised Online Guide Pages

Topic: DTA Connect
Page: DTA Connect Q&A

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 Procedural Issues Mailbox.

Systems issues should be directed to the Systems Support Help Desk.