



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

MAURA T. HEALEY
GOVERNOR


KATHLEEN E. WALSH
SECRETARY

KIMBERLEY DRISCOLL
LIEUTENANT GOVERNOR

JEFF McCUE
COMMISSIONER

**Online Guide Transmittal 2024-39
July 18, 2024**

To: Department of Transitional Assistance Staff

From:  Sarah Stuart, Associate Commissioner for Local Implementation and Special Populations

Re: Cross Program: Updates to DTA Connect My Info Page

Overview

As detailed in Online Guide Transmittal [2024-17](#), the Department completed Phase 1 of enhancements to the DTA Connect My Info page, which aimed to maximize self-service options and benefits for clients, and streamline work for staff. Since the release of Phase 1, additional systems changes have been implemented to resolve challenges. The Department has resolved various issues that emerged after the implementation and had made additional enhancements to improve the efficacy of updates made through the My Info page.

Purpose

The purpose of this Online Guide Transmittal is to advise staff of the post-deployment updates to BEACON and the Online Guide following the changes detailed in Online Guide Transmittal 2024-17.

Systems Resolutions & Enhancements

To address pain points the following systems changes have been implemented:

- **Created a New Action for Cases Moving from Caseload to FAW model:** BEACON now creates a new Action, DTA Connect – Caseload to FAW Review, when:
 - the cash case has been closed for 30 days and the SNAP case remains open; **and**
 - there is a pending record or multiple records on the Client Info Update DTA Connect case manager’s view at the time of the transition.

This new action ensures a smooth transition from the caseload model to the FAW model and that reported changes are addressed timely.

- **Updates to the Optimal Proration Tool:** The Optimal Proration Tool has undergone the following enhancements:
 - For clients with non-recurring medical expenses who will receive maximum SNAP benefits even if the non-recurring medical expenses are not counted, the Optimal Proration Tool now instructs staff on what to enter in the Number of Months field in the Medical Expense page.
 - The existing Mileage Calculation Worksheet is now embedded into the Optimal Proration Tool. Staff can choose to enter mileage via the embedded Mileage Calculation Worksheet, and the information will automatically feed into the main worksheet.
 - The Optimal Proration Tool now includes a single button for converting the spreadsheet to a PDF file, as well as a button to clear all the data entry fields.
 - **Fix to the DTA Connect – Reported Change Action:** The DTA Connect - Reported Change action will appear if a client uses DTA Connect to report a change at any time during the 45-day Interim Report or recertification period, even if the Interim Report or recertification process is not yet initiated in BEACON.
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**Procedural
Updates &
Clarifications**

The following updates and clarifications have been made to the Online Guide to online procedures staff must take in the following circumstances:

- **Reported Address Change During Case Maintenance:** The guidance in the [Simplified Reporting – Examples](#) for handling reported address changes has been corrected to align with the guidance outlined in 2024-17: If a client on Simplified Reporting reports a change in residential address during case maintenance but does not provide information on shelter and utility costs, staff must reach out to the client to have them telephonically self-declare these expenses. If staff are unable to obtain the telephonic self-declaration, staff must send an optional VC-1 for shelter and/or utility costs. The case must then be **immediately wrapped without crediting the expenses**, unless it results in the case getting denied or the benefits decrease to \$0.
 - **Medical Expense Frequency:** If a client submits medical expense verification but staff are unable to ascertain the frequency of the payments, staff must call the client. However, if contact is unsuccessful, staff must send an optional VC-1 for the frequency.
 - **Related Benefits/Non-recurring Medical Expenses:** If crediting a non-recurring medical expense reduces a household's net income to zero, staff must issue a related benefit for the month in which the change was reported. In addition, when entering the non-recurring expense in BEACON, the proration period will start with the month following the reported change.

Example: A non-recurring expense is reported in the middle of February 2024 and reduces the household's net income to \$0. The optimal proration of the expense is 12 months. The staff member issues a related benefit for February and enters the proration period from March 2024 through February 2025.
 - **Updates to Homeless Status:** A correction was made to the Online Guide regarding what occurs in BEACON when clients update their homeless status on DTA Connect. If a client indicates on DTA Connect that they are homeless, BEACON will autowrap the case (unless the client reports other changes on DTA Connect that do not meet the autowrapping criteria).
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**Revised Online
Guide Pages**

Topic:	Self-Service Options
Page:	DTA Connect: My Info Page
Topic:	Self-Service Options
Page:	DTA Connect: Updating Address
Topic:	SNAP
Book:	Certification Types
Chapter:	Simplified Reporting
Page:	Simplified Reporting Examples
Topic:	SNAP
Book:	Certification Types
Chapter:	Simplified Reporting
Page:	Simplified – Interim Report
Topic:	SNAP
Book:	Certification Types
Chapter:	Simplified Reporting
Page:	Simplified Reporting - Recertification
Topic:	SNAP
Book:	Expenses and Deductions
Chapter:	Health Insurance/Medical Expenses
Page:	Overview of Medical Expense Deduction
Topic:	SNAP
Book:	Expenses and Deductions
Chapter:	Health Insurance/Medical Expenses
Page:	Non-recurring Medical Expenses
Topic:	SNAP
Book:	Expenses and Deductions
Chapter:	Health Insurance/Medical Expenses
Subchapter:	Medical Expenses
Page:	Federal Mileage Rates – Medical
Topic:	Cross Programs
Book:	Request for Assistance (RFA)
Page:	Address (RFA)

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 them to [DTA.Procedural Issues@massmail.state.ma.us](mailto:DTA.ProceduralIssues@massmail.state.ma.us).

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