



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

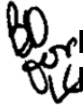
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Commissioner

**Operations Memo 2014-26
March 25, 2014**

To: Department of Transitional Assistance Staff

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

Re: Electronic Document Management (EDM) Release 1.1

Overview

On January 31, 2014, DTA implemented Electronic Document Management (EDM), Release 1. It is anticipated that periodically, between major releases, enhancements will be added and possible fixes will be made.

Effective March 24, 2014, a number of enhancements were to DTA myWorkspace (MWS). These enhancements are the result of bugs and issues raised by Central Office and TAO staff.

Enhancements to DTA myWorkspace

The following fixes will be implemented with Release 1.1, effective March 24, 2014.

This enhancement prevents any lag time between documents being indexed at the EDMC and their availability in MWS. Automations have been implemented to reduce lag time, as DTA processing is time-sensitive.

Previously, if a New document was linked to a Processed task, all formerly processed documents for that task would become unchecked, in the 'Processed?' checkbox. This had created a two-fold problem: it gave a false indication that previously processed documents had not been processed; and the user was required to mark those tasks processed a second time, therefore duplicating work.

**Enhancements
to DTA
myWorkspace
(continued)**

With this Release, when a New document is linked to an existing Task, any documents that had been previously checked as ‘Processed?’ under that task will remain checked. When users review the Task Summary page, only documents needing to be reviewed will be required to be checked as ‘Processed?’

Also, based on user suggestions, and on documents received at EDMC, new Task Categories and Document Types have been added and are now available through the Search Tab and Edit Index function. See Attachment A for a listing of those Task Categories and Document Types.

User Guidance

When accessing tasks in MWS, users should do the following:

- When a task displayed in the Office field is assigned to an incorrect office, select the correct office in the Office field and select ‘Change to New’ to ensure that the task will be seen by the correct office. Tasks must not be delivered directly to users in another TAO or Central Office Unit.
- For clients who do not have an AP ID annotated on documents assigned by EDMC mail clerks, it is the user’s responsibility to enter the AP ID once it is assigned by BEACON after completing the RFA.
- Permanent Verifications must be annotated in MWS document notes.

In BEACON, users must indicate particular tasks/documents using the Folder ID in the case narrative to expedite searching. This is especially helpful for supervisory review.

Note: The Date Received at the EDMC, which is stamped on the document, is the date used for QC and processing standards.

**Tasks in
‘Assigned’
Status and
‘Hold’
Status**

Supervisors are reminded to monitor aging tasks in MWS. Tasks that are in an ‘Assigned’ status for more than 5 business days should be reviewed and the reason for the delay must be addressed. Tasks that are in a ‘Hold’ status for more than 10 business days should also be reviewed.

Until reports are available in MWS, managers must use the Search Tasks tab to monitor TAO and Central Office Unit progress in assigning and processing tasks.

**EDMC
Processing
Standards**

For standard DTA forms that include the AP ID, first and last name, and TAO, EDMC mail clerks will not be required to access BEACON in order to complete SSN and DOB indexing fields. For documents that do not include these data elements, EDMC mail clerks will use BEACON to complete the indexing fields.

Questions

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

Attachment A
Changes to DTA myWorkspace Task Categories and Document Types.

The following Task Category and Document Types have been added:

Document Type	Task Category
INT-1	INT
INT-2	

The following Document Types have been added to the Employment and Training Task Category:

Document Type	Task Category
EDP Warning Notice	Employment and Training
Transition Plan	
SNAP Job Search Log	

The following Document Types and Task Categories have been added:

Document Type	Task Category
TAFDC Reevaluation	TAFDC Reevaluation
EAEDC Reevaluation	EAEDC Reevaluation
Direct Deposit Form	Direct Deposit Form
Voluntary Withdrawal	Voluntary Withdrawal
SSI/SNAP Benefits Reapplication	SSI/SNAP Benefits Reapplication
Disability Determination Tracking Form	Disability Determination Tracking Form
Bay State CAP Recertification Form	Bay State CAP Recertification Form
Special Utility Expense	Special Utility Expense

Note: TAFDC Reevaluation was formerly called TAFDC Review.

The following Document Type and Task Category have been moved from Employment and Training to a new Task Category:

Document Type	Task Category
Monthly Report	Monthly Report