The following table includes several frequently asked questions about the **Electronic Document Management (EDM) Project – Release 1**, set to go live on January 31, 2014. Please contact your local Champion of Change for more information!

Question	Answer
Document Scanning	
1. **What documents will be handled at the Electronic Document Management Center (EDMC) as part of Release 1?**	In Release 1, only postal mail will be scanned and indexed at the EDMC. Starting January 31, 2014, clients will be directed to mail documents to: DTA, PO Box 4406, Taunton, MA 02780-0420.
2. **Will documents be date stamped at the EDMC?**	Yes. The first page of all documents will be date stamped upon arrival at the EDMC.
3. **How long does it take for documents mailed to the EDMC to be available to a TAO?**	All mail received at the EDMC will be scanned and available in DTA MyWorkSpace (MWS) within 24 hours of receipt. In many instances, the document will be available the day in which it was received at the EDMC.
4. **What happens to a paper document after it is scanned at the EDMC?**	All paper documents will be held for 60 days at the EDMC, after which those documents will be destroyed.
5. **What happens to an original document a client sends to the EDMC (e.g. birth certificates, social security cards, etc.)?**	All official documents mailed to the EDMC will be scanned and then promptly mailed back to the client directly from the EDMC. Any document that the client requests to be returned will also be mailed back to the client.
6. **What will happen to unidentifiable mail at the EDMC?**	In the event that the EDMC cannot identify the TAO that the document should be associated with (based on the information available on the document or the envelope), EDMC scanning clerks will have inquiry-only access to BEACON. This will allow scanning EDMC clerks to look up the case in BEACON and associate it with the correct office. If the TAO remains unknown, the scanning clerk will label the Client's Town as "Unidentifiable," and a dedicated DTA staff person will conduct additional research on the document.
7. **How will the EDMC deal with documents written in Spanish?**	EDMC scanning clerks currently handle Spanish forms for MassHealth, and will have a similar process for DTA documents. Documents in Spanish submitted to DTA can be accurately scanned and indexed at EDMC.
8. **How will personal letters and other correspondence sent from clients be handled?**	These documents will be indexed the same way that all other document types will be. If these are mailed in without other DTA forms or verifications, the Document Type will be labeled as "Client Correspondence."
9. **Will the EDMC scan envelopes?**	Generally speaking, no. Only envelopes directed to the Division of Hearings will be scanned. It should be noted that there is a 64-character index field for EDMC scanning clerks to type any relevant information from the envelope. In most instances, this will be the Case Manager's name written on the envelope.

Question	Answer
10. What happens when a document comes into the EDMC that is unreadable?	Any document that arrives at the EDMC and is unclear or illegible will be stamped "As Received." Marking a document "As Received" indicates that the document was received at the EDMC in its current form and that the image could not be improved upon. The EDMC will still scan the document and route it to the correct TAO. It will then be the responsibility of the Clerk or Case Manager to either use the document or request a new copy from the client. It should be noted that the scanning equipment used at the EDMC results in high-quality electronic images. There should be little to no degradation in quality once a document is scanned.
11. If multiple documents are received in a single envelope, how will those documents be indexed at the EDMC?	Clients may enclose multiple documents in a single envelope, for example, an application with verifications. When multiple documents are received in a single envelope, all of the documents will be scanned and indexed as a single PDF file and the document with the highest priority value will be identified as the "Lead Document." For example, if a SNAP Application is submitted with verifications (pay stubs, copies of expenses, and a birth certificate), the Document Type selected will be "SNAP Benefits Application" rather than "Verification."
12. How will the EDMC know what a document is and how to identify it?	DTA will provide the EDMC scanning clerks with training on how to identify DTA documents and where unique identifying information exists in the document. A reference guide will also be provided to EDMC staff, containing samples of all documents that will likely be mailed to the EDMC.
13. Will returned mail be sent to the EDMC? How will this process work?	The EDMC will receive some returned mail directed to DTA. These envelopes will be collected and processed by DTA at the Taunton TAO, alleviating other local offices from having to process some returned mail.
14. Can workers forward documents to the EDMC if they want them to be digital?	Documents should not be forwarded to the EDMC in Release 1. Any document dropped off at a TAO or exchanged during a client interaction should be processed as it is today, and filed into the paper case file. As part of release 2, a process will be implemented to scan documents *after* they have been received and processed at the local office.
15. How long will it take for mail to be received at the EDMC?	Mail will be picked up daily at the local PO Box and will follow normal USPS service standards.
DTA myWorkspace (MWS)	
16. Is DTA myWorkspace replacing parts of BEACON?	No. MWS is simply a tool to view, route, and file electronic documents. BEACON remains the case management system of record. MWS does not replace anything that is currently done in BEACON today.

Question	Answer
17. Will workers in one TAO be able to view documents from a different TAO?	Yes, all documents scanned and available in MWS (with the exception of some Program Integrity documents) can be viewed by staff across the state.
18. What will my login and password for DTA myWorkspace be?	Users will login to MWS using their WELID. Users will be responsible for creating and maintaining their own password, which will have the same character requirements as BEACON. DTA recommends that users change their MWS password when they change their BEACON password.
19. Are there restrictions on routing documents or viewing documents in DTA myWorkspace?	Most users can view and route most documents available in the system. The history of document delivery is tracked and visible in MWS to all users.
20. Will there be a way to purge documents in DTA myWorkspace?	Individual users cannot delete documents from MWS. However, DTA will purge documents in MWS according to statewide record retention policies.
21. Will there be a way to delete duplicate documents in DTA myWorkspace?	No. Documents that have already been received must be processed and marked as "Duplicate – No Action Taken."
22. Can DTA myWorkspace assign a task to two separate workers?	This functionality will not be available in Release 1. However, a document can be passed along to a colleague using the "Deliver To" function, and documents can always be viewed using the "Search Tasks" function.
23. Can the actual documents in DTA myWorkspace be edited?	No. Documents in MWS appear in PDF format and cannot be edited.
24. How long will documents be available electronically in DTA myWorkspace?	Documents scanned into MWS will be available in electronic format in accordance with statewide record retention policies.
25. Can we print documents from DTA myWorkspace?	Documents can be printed from MWS, but this is strongly discouraged. Exceptions could include printing documents that need to be returned to the client (i.e. an application is missing a signature).
Business Process	
26. What if a document is returned incomplete, such as an application that is not signed?	Documents mailed to the EDMC will be scanned and indexed regardless of whether they are complete. It will be the responsibility of the Clerk or Case Manager to act upon an incomplete form.
27. If I find a document I want to process, can I self-assign?	Staff will have the ability to search for new documents and self-assign them prior to delivery by clerks.
28. Can documents be searched for regardless of status?	Yes. Documents can be searched for regardless of whether they are new, assigned, on hold, or processed.

Question	Answer
29. How will documents be routed to the correct TAO or Case Manager?	Using information on the document or information in BEACON, the EDMC scanning clerks will associate the document with the correct TAO. It will be the responsibility of TAO clerks to "Deliver" the documents to the correct Case Manager. The EDMC scanning clerks will <u>not</u> deliver documents to individual Case Managers.
30. In Release 1, will client documentation consist of both electronic and paper documents?	Yes. During Release 1, staff will work with both electronic and paper documents to carry out eligibility activities. Documents received electronically should not be printed for the paper case file (if one already exists). Paper documents received during Release 1 should be processed and filed as usual.
31. Is a supervisor notified when a case manager receives a task?	No. However, supervisors (and other users) may view all tasks currently assigned to an individual worker.
Clients	
32. How will we encourage our clients to mail documents to the EDMC?	DTA will notify clients of the upcoming changes via a mass mailing in January, and will utilize brochures and posters in TAOs. It will also be incumbent upon DTA staff to hand out postage paid business reply envelopes, and to educate clients about the benefits of mailing documents vs. dropping them off.
Project Outcomes	
33. How does EDM/DTA myWorkspace benefit the clients?	Clients benefit from EDM in several ways: 1. Once a document is scanned and correctly indexed into MWS, it cannot be lost and is easily available for use at a later date. 2. The search functionality in MWS will allow faster and easier access to client documentation, allowing DTA staff to look-up and confirm the receipt of documents. 3. The use of postage paid self-addressed envelopes will save clients the cost of postage and/or the time required to travel to a TAO to submit documents in person.
34. How does EDM/DTA myWorkspace benefit DTA staff?	DTA staff benefit in several ways – 1. Clerks will no longer have to physically open the mail and deliver documents to workers. 2. MWS will reduce the paper burden at TAOs and for Case Managers, making it easier to stay organized. 3. Once a document is scanned and indexed into MWS, it cannot be lost or misplaced. 4. Supervisors will be able to conduct supervisory review with fewer paper documents.