Commonwealth of Massachusetts
Executive Office of Health and Human Services

DTA Electronic Document Management (EDM) - Release 1 DTA Training Sessions

DRAFT – FOR DISCUSSION ONLY

Introductions

- DTA Trainers
- DTA Champions of Change
- DTA Champions of Train
- PCG Trainers
- Training Participants

Training Objectives

- Understand the EDM/DTA myWorkspace project
- Gain an introduction to Electronic Document Management Center (EDMC) Role and Activities
- See a demonstration of the EDM/DTA myWorkspace System
- Experience hands-on exercises using DTA myWorkspace
- Master effective use of new large screen computer
- Understand how this change affects you and DTA clients
- Discuss Next Steps

myWorkspace Training Objectives

- Navigate through myWorkspace
- Search for tasks
- View two windows simultaneously
- Receive a new task
- Deliver a task
- Index a document
- Self-assign a task
- Dispose of a task

What is this and why are we doing it?

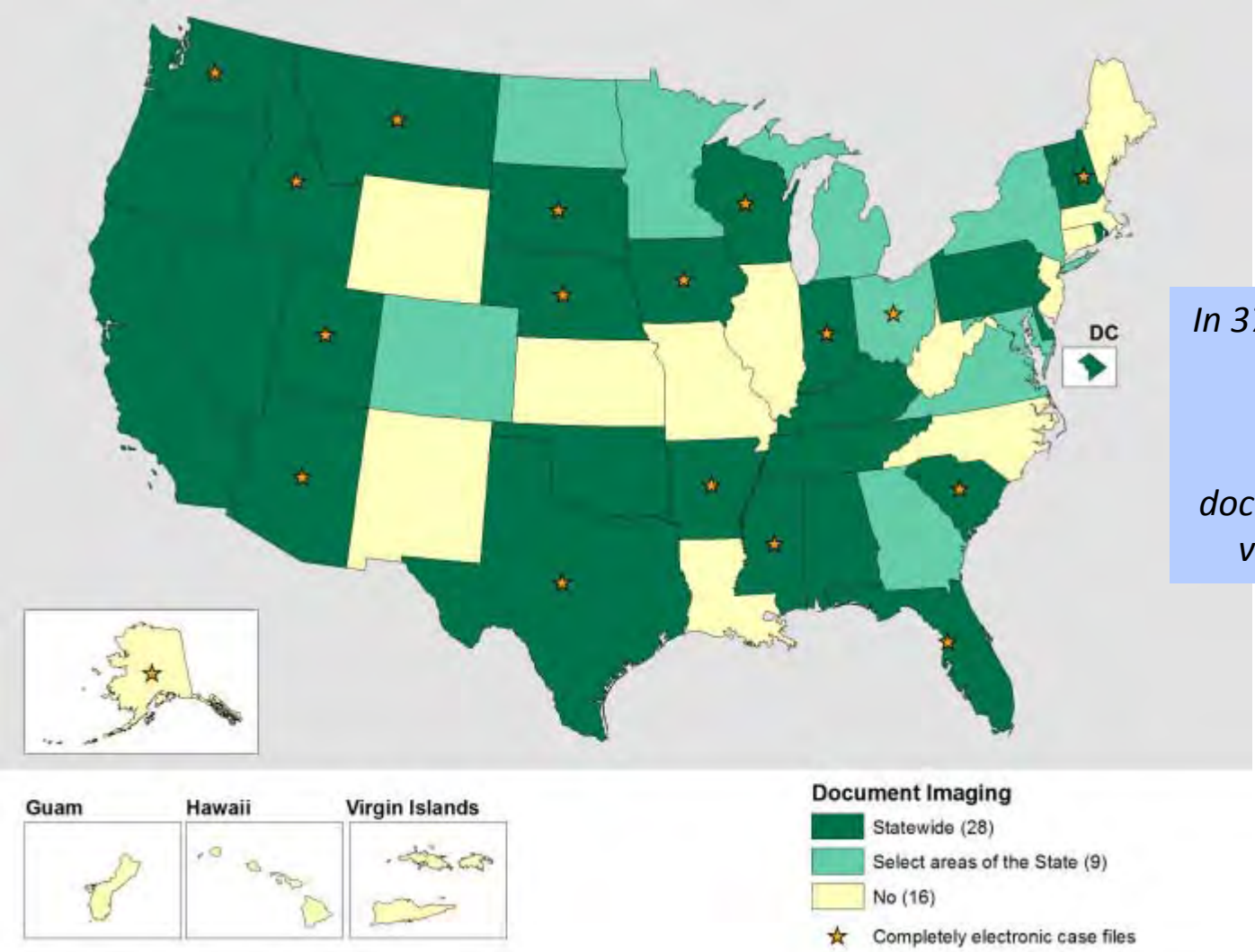
Electronic Document Management (EDM) and DTA myWorkspace (MWS)

In an effort to streamline business processes, enhance program integrity, improve client outcomes, and prepare for a customer-centric integrated eligibility environment, the Executive Office of Health and Human Services (EOHHS) and DTA have initiated a comprehensive effort to identify and implement near-term and long-term operational improvements.

The overall goals of this project include the following:

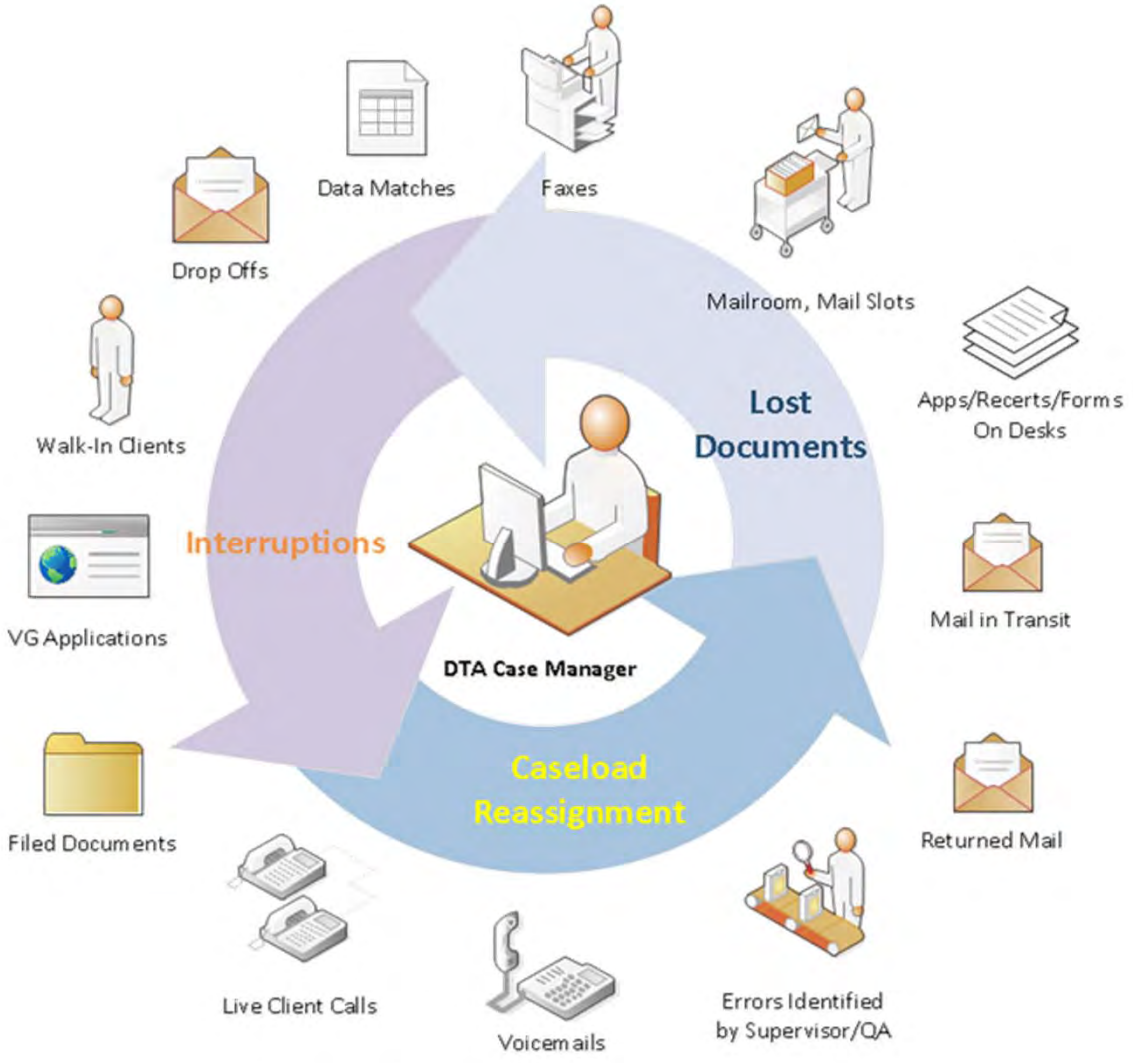
- Enhance program integrity and overall operating efficiency
- Improve the timeliness of processing of applications and improve customer experience
- Support the EOHHS vision for No Wrong Door for customer entry
- Create more time and capacity for staff to help families
- Strengthen and streamline verification processes
- Strengthen and streamline customer service activities
- Increase staff engagement and make a career at DTA exciting, attractive and fulfilling

Project Overview – Other States



In 37 states across the country, SNAP agencies have implemented document imaging to various degrees.

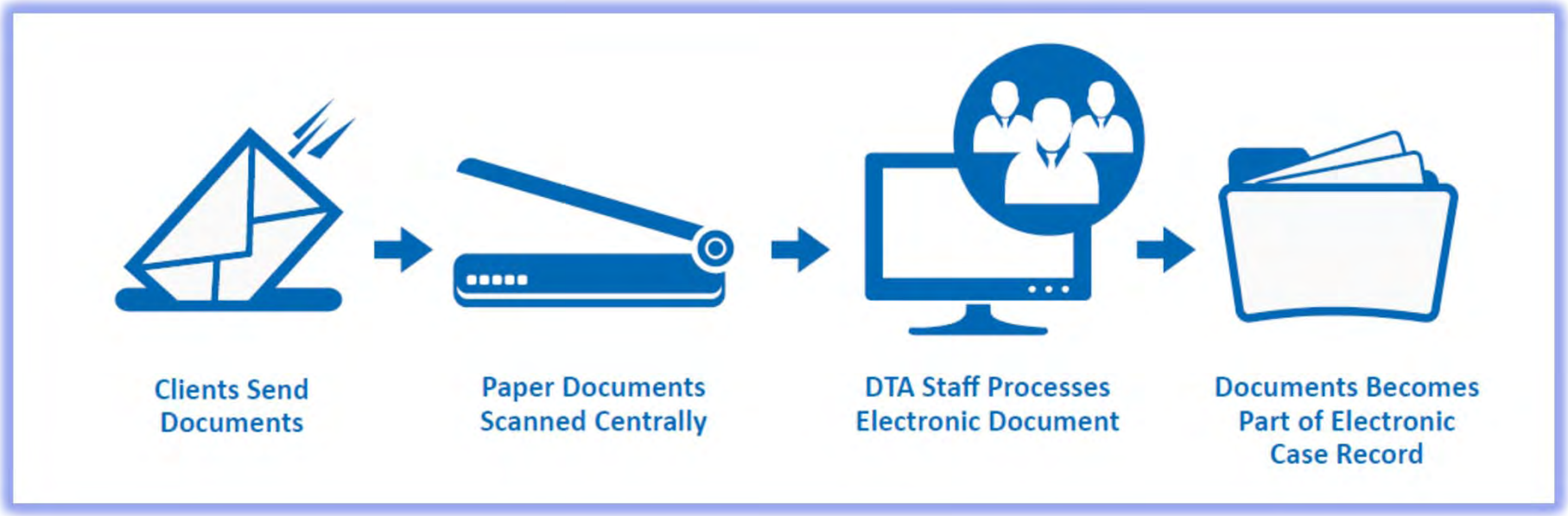
Project Overview – Current Processes



At any moment in time, documents and tasks come in from different sources at different times, making it difficult to prioritize and focus on those priorities.

DTA staff spend a great amount of time shuffling, prioritizing and distributing work.

Project Overview – New Process



EDM Phases

Release 1: May 2013 – January 2014

- EDM – centralized scanning and indexing of documents
- DTA myWorkspace (MWS) Configuration
- MWS – Postal Mail

Release 2: Late Spring 2014

- MWS – Walk-Ins
- MWS – BEACON
- MWS – Faxes, In-Agency Drop-offs
- Single Sign-on between BEACON and MWS

Release 3: Summer 2014

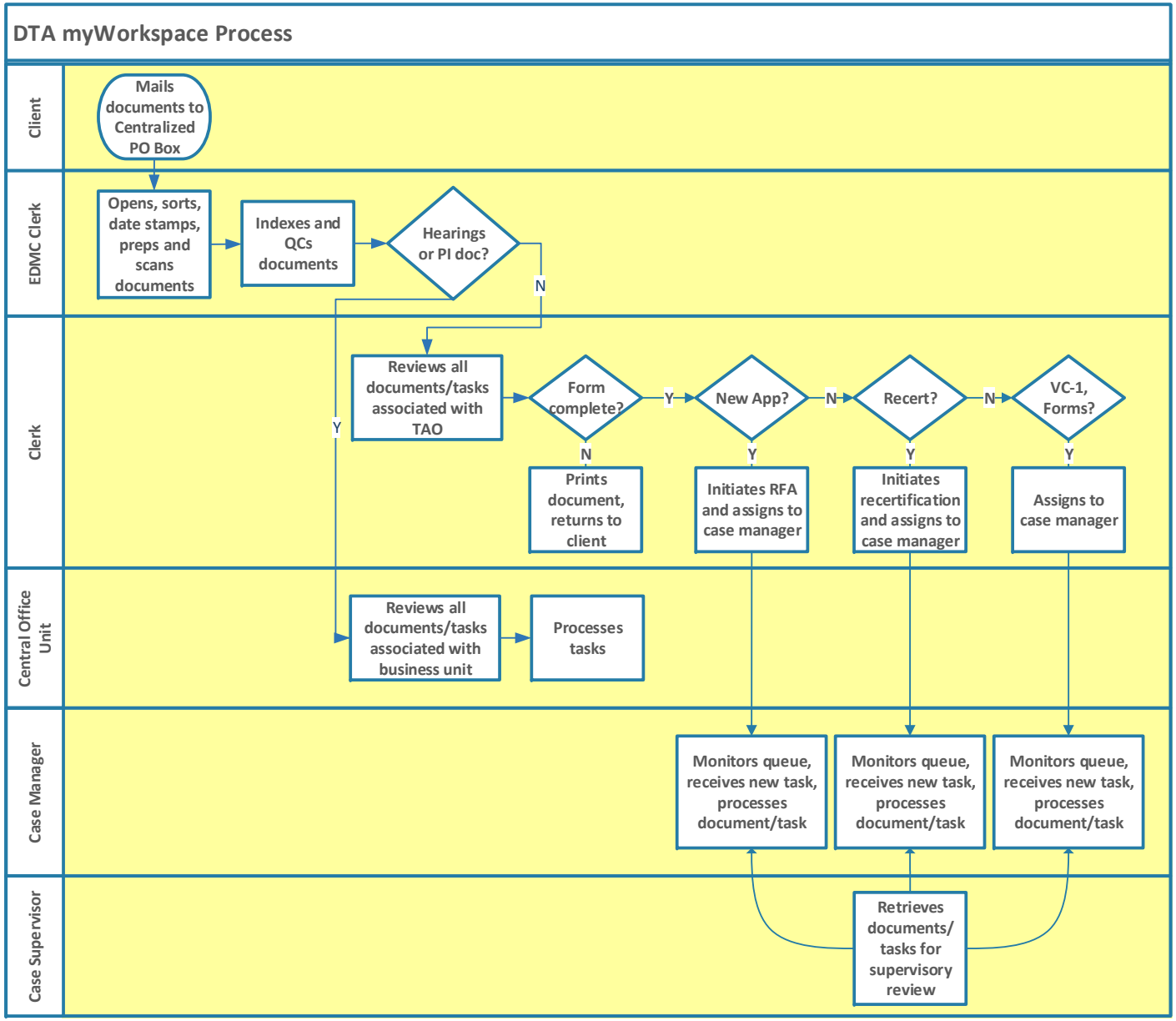
- MassHealth Document Search
- Interactive Voice Response (IVR)
- Portal Search for Household Information

EDM Release 1 – Things to Know

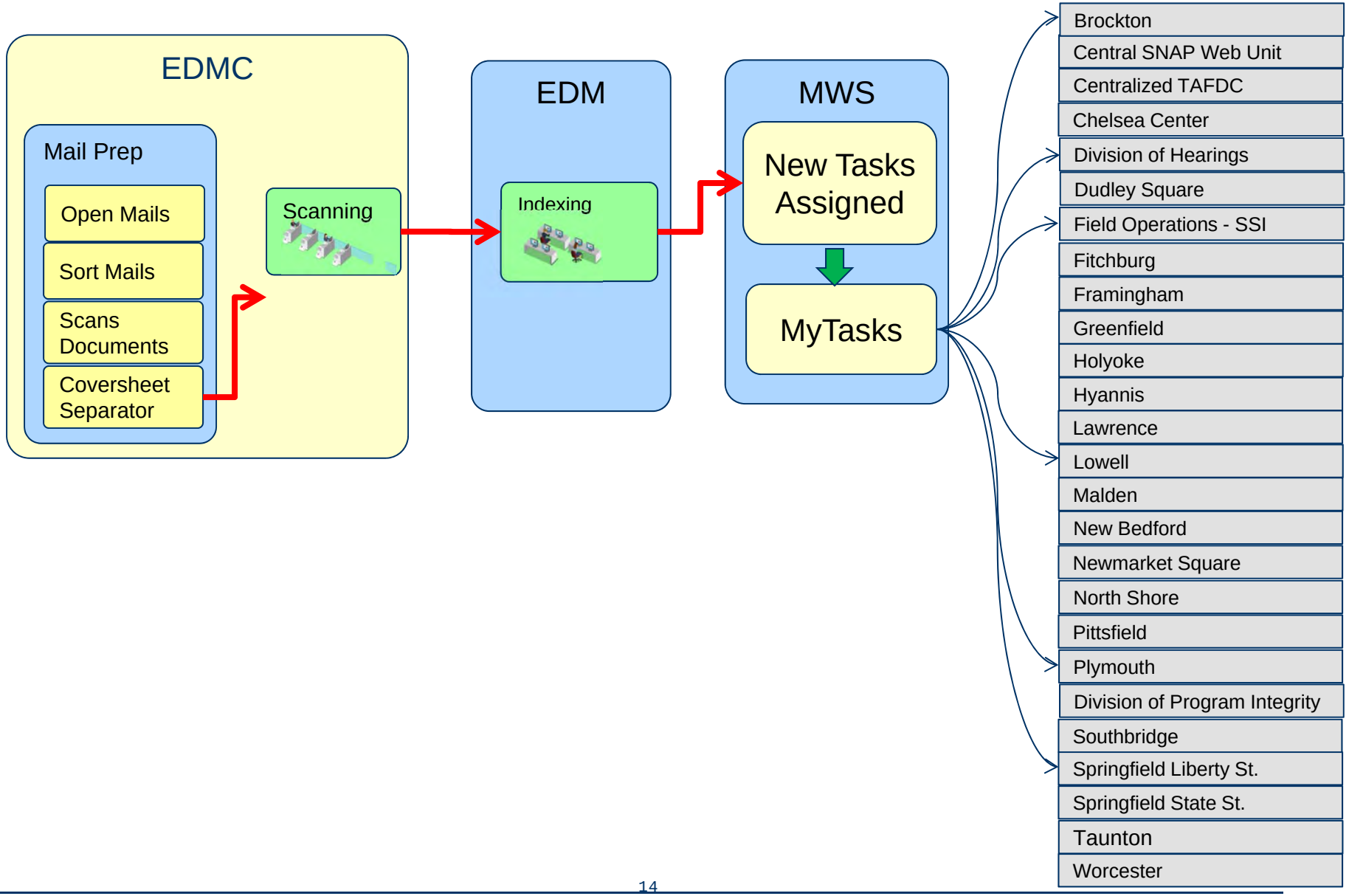
- Release 1 focuses on implementing EDM and MWS to facilitate the centralized scanning of **postal mail**.
- DTA will largely maintain its current business processes for Release 1 and employee roles will not significantly change.
- A vast majority of documents that are currently mailed to local offices by clients (e.g. verification requests, recertifications, applications) will be routed to a centralized scanning unit at the Electronic Document Management Center (EDMC).
- While centralized scanning staff at the EDMC will scan and index documents, clerks in the local office will continue to manually route incoming documents.
- Document routing will be driven by client location and TAO catchment areas, however TAO clerks may need to re-route documents to workers outside of their local offices (e.g. if documents are misdirected to the improper TAO).
- Release 1 will also include Central Office business units, including the Division of Hearings and Division of Program Integrity.

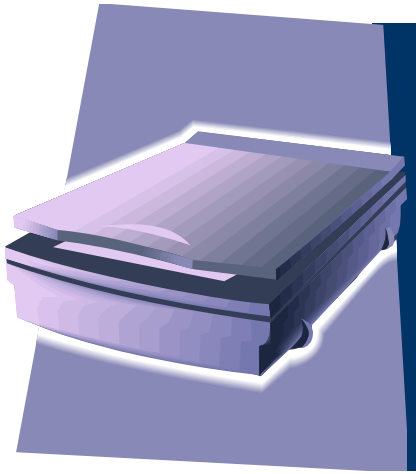
The Business Process

EDM Release 1 Business Process Flow



EDM Release 1 – Business Process Flow



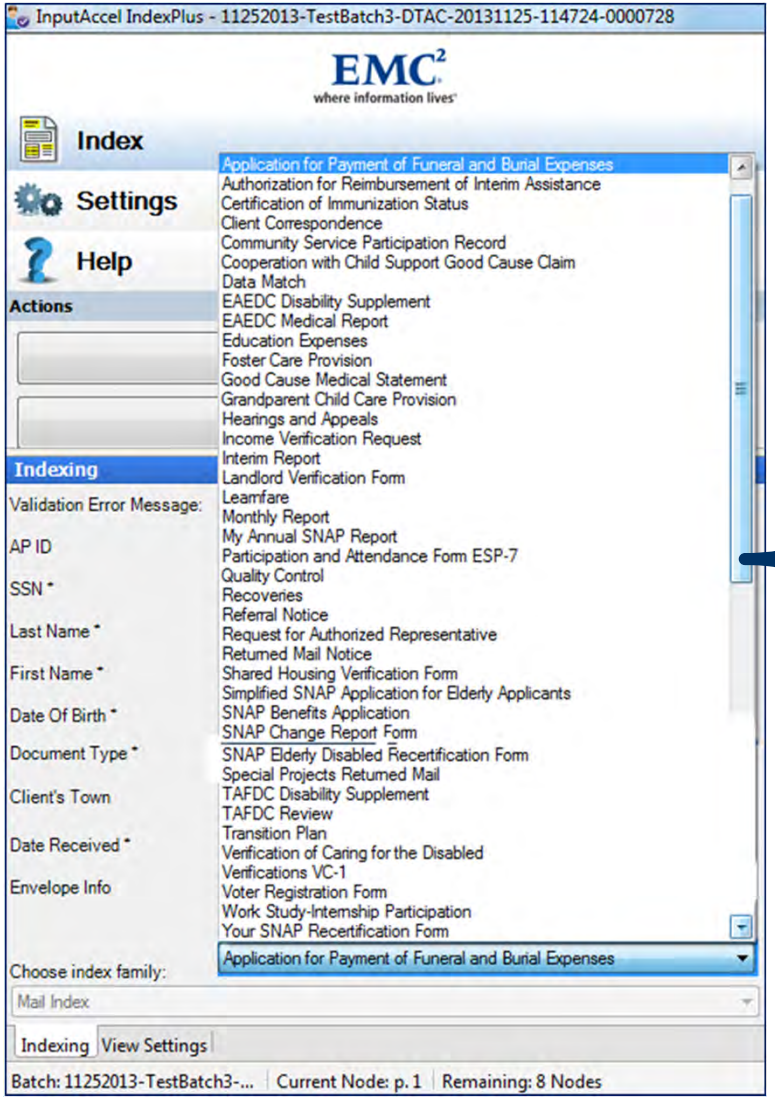


How do these tasks get to a TAO?

All About the Electronic Document Management Center (EDMC)

Let's watch a short video to learn about the EDMC!

Document Index

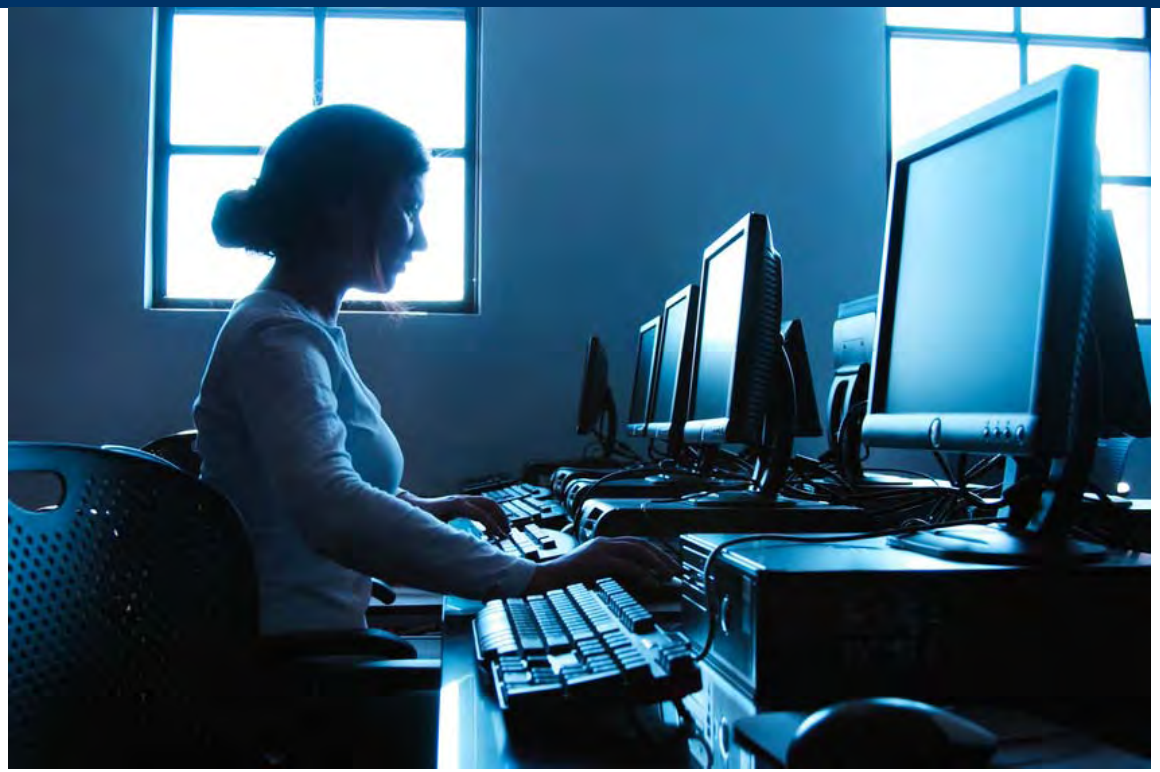


Document Type	Task Category
SNAP Benefits Application	SNAP Application
Simplified SNAP Application for Elderly Applicants	SNAP Elderly Disabled Application
My Annual SNAP Report	SNAP Annual Report
Your SNAP Recertification Form	SNAP Recertification
Interim Report	SNAP Interim Report
SNAP Elderly Disabled Recertification Form	SNAP Elderly Disabled Recertification
Verifications VC-1	Verification
Landlord Verification Form	
Shared Housing Verification Form	
Cooperation with Child Support Good Cause Claim	
Good Cause Medical Statement	
Certification of Immunization Status	
Verification of Caring for the Disabled	
Education Expenses	
Monthly Report	Employment and Training
Participation and Attendance Form (ESP-7)	
Foster Care Provision	
Grandparent Child Care Provision	
Community Service Participation Record	
Referral Notice	
Request for Authorized Representative	Case Maintenance
Returned Mail Notice	
Special Projects Returned Mail	
SNAP Change Report Form	
TAFDC Disability Supplement	TAFDC Disability Supplement
EAEDC Disability Supplement	EAEDC Disability Supplement
EAEDC Medical Report	EAEDC Medical Report
Learnfare	Learnfare
Work Study/Internship Participation	Work Study/Internship
School Verification	School Verification
Recoveries	Recoveries
Hearings and Appeals*	Hearings and Appeals
Quality Control*	Quality Control
Data Match*	Data Match
Application for Payment of Funeral	Application for Payment of Funeral
Assignment of Third Party Recovery	Assignment of Third Party Recovery
Third Party Income Verification Request	Third Party Income Verification Request
Voter Registration Form	Voter Registration Form
TAFDC Review	TAFDC Review
Client Correspondence	Client Correspondence
Authorization of Reimbursement AP-SSI-IAR	Authorization of Reimbursement AP-SSI-IAR

Central Scanning – Things to know!

- Electronic Document Management Center (EDMC) unit will process all received mail within 24 hours of receipt.
- Envelopes will NOT be scanned. EDMC Clerks will enter relevant information from envelopes into the “Envelope Info” field in EDM.
- After scanning, all other documents will be boxed and stored for 60 days and then shredded.
- EDMC Clerks will have limited, read-only access to BEACON to research cases and index documents more thoroughly.
- Official original documents (e.g. birth certificates, passports) will be returned to the client.
- Unidentifiable documents will go into a queue to be researched according to TAO standard operating procedures, and will be accessible by all TAOs.

Let’s Dive In!



Alternatives and Exceptions

- When to re-assign a task using “Deliver To User” function:
  - The task has been assigned to the wrong case manager, or the assigned case manager has changed.
- When to change the “Office” field in Task Summary Page:
  - The task should go to another TAO or a central office business unit, but it is unclear to whom the task should be assigned.
- When to “Self-Assign” a task:
  - The task was no yet “delivered” the task to the Case Manager, but needs to be processed by the Case Manager.
  - The Clerk needs to print and return the document to the client (and dispose of the task).
- When to “Change to New” a task:
  - A task may need to be changed to “New” if indexing information was updated, but the task still needs to be disposed. Note: The “Change to New” button removes assignments.

Other things to know

- BEACON is still the case management system and the primary system of record. DTA MWS is not intended to replace that.
- As part of an upcoming mailing, information will go out to all clients announcing the change and the benefits to them.
- Postage paid business reply envelopes will be provided to all TAOs to encourage mail delivery to the Electronic Document Management Center (EDMC).
- While the system is being implemented on January 31, 2014, it may take several weeks before you start to see significant volume funneling through the system.
- This is the beginning of a transformation of how DTA provides services to our clients.

What's in it for me?

- No more chasing paper!
- We will start serving clients more like a team – meaning less stress for you, and faster service for clients.
- We want to provide more transitional assistance for our clients.
- These changes are a necessary stepping stone to future changes in integrated eligibility.
- We want to make DTA an even better place to work – a place where staff can feel good about the level of support they can offer and the range of support they can offer.
- We want to create an environment in which workers can take a lunch break or take vacation time without worrying about accumulating work. By streamlining eligibility operations, we hope to "buy back" time so that workers can refocus on quality time helping clients.

What about the clients?

- **DTA is introducing a new way of doing business to serve the client better.** We are undertaking major changes in order to serve the client better, moving toward a more modern way of doing business. The client will experience several changes in the months and years to come that will be different than what you have experienced in the past.

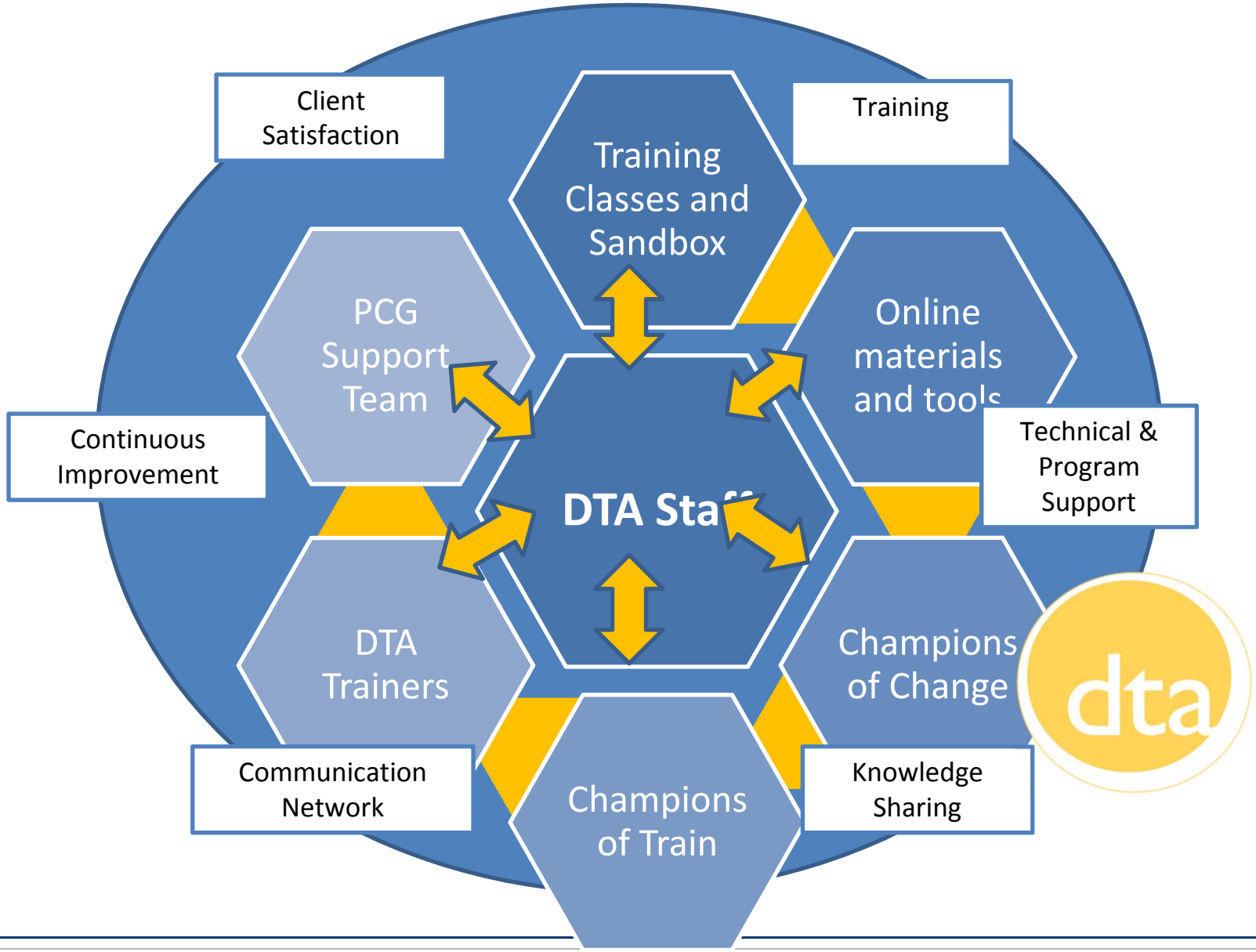
- **We will provide the client with more reliable ways to interact with our agency.** We understand that the client's time is valuable, and that DTA benefits provide important supports. We are looking to restore confidence that the client's calls will get answered, documents will be processed, and that we will make fair and timely decisions. We are also looking to make more interaction happen through internet, phone or mail so that the client does not have to make an unnecessary trip to a local office.

- **We are looking for client input.** We welcome client participation in this process, and welcome staff to provide client feedback to us. The clients are important partners in improving our services.

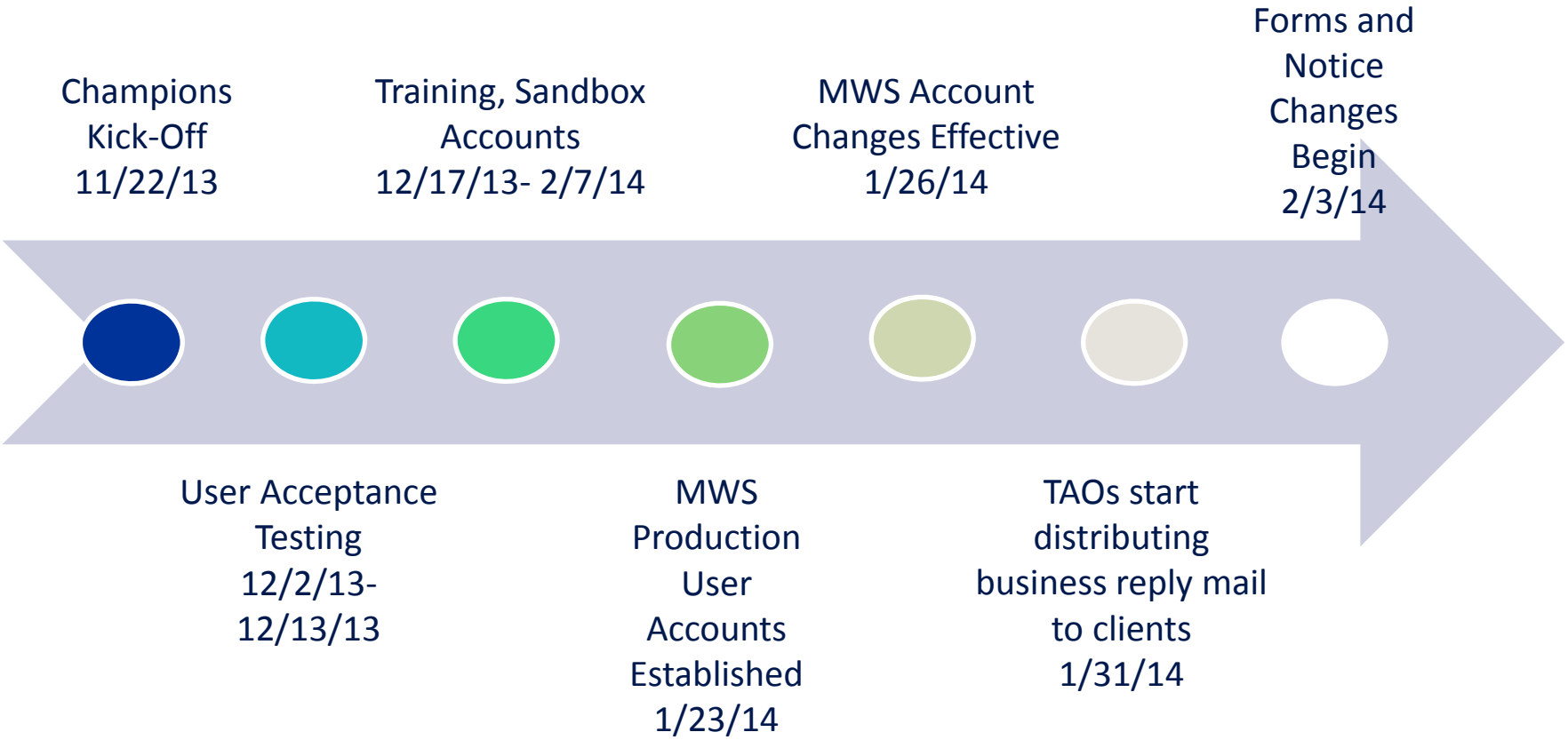
What additional support is available?

- Sandbox- practice environment in myWorkspace
- Champions of Change
- Champions of Train and DTA Trainers
- Online training materials
- Refresher Webinars
- Post Implementation conference calls
- EOHHS IT Support
- DTA MWS Business Administrator

Project Overview – Implementation Support



Key Implementation Steps



Questions and Answers