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**Online Guide Transmittal 2024-17**  
**March 6, 2024**

**To:** Department of Transitional Assistance Staff

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

**Re:** Cross Program: DTA Connect My Info Page Enhancements and BEACON Interface

**Overview**

To maximize DTA Connect self-service options, improve BEACON functionality, and ease the administrative burden for staff, both the DTA Connect My Info page and BEACON have been enhanced. These enhancements are expected to maximize SNAP benefits, reduce phone traffic and expedite the time it takes to update certain case information. Due to the complexity of enhancements across systems, DTA programs, and the medical expense calculation, this project has been split into multiple phases: The anticipated effective date for Phase 1 is March 8, 2024.

These enhancements will give clients the ability to update certain household information as a self-declaration through the DTA Connect My Info page and require minimal caseworker intervention. This means that the self-declared information reported on DTA Connect will automatically transfer into BEACON and create a datasheet in the BEACON case record.

The My Info page will also provide more case details to make it easier for clients to determine whether their case information is correct. For SNAP-only cases, entries made on DTA Connect will allow BEACON to either autowrap the change or create an Action when further review is required. For TAFDC/EAEDC cases, the entries will cause the grantee's name to appear on a new BEACON view for review by an Economic Assistance case manager.

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**Overview  
(Continued)**

The medical-expense-related enhancements are discussed in a separate Transmittal to be deployed concurrently with this one: [OLGT 2024-18](#).

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**Purpose**

The purpose of this Online Guide Transmittal (OLGT) is to advise staff about the upcoming enhancements to both DTA Connect My Info page and how it will interface with BEACON. In addition, this OLG is being released early to allow staff advanced notice of the changes. The corresponding Online Guide (OLG) pages will be directly deployed into the OLG for March 8, 2024.

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**Cross Program  
Enhancements**

The DTA Connect My Info page enhancements include the following updates for all Department programs:

- **Case Information Summary:** Based on entries in BEACON, DTA Connect displays information that we have on record such as address, shelter and utility costs, dependent care costs, etc.
  - **Edit Capabilities for Clients:** DTA Connect allows clients to edit their Residential Address, Mailing Address, Shelter Expenses, and Utility Expenses. Additionally, clients can edit their Dependent Care Expenses, and/or Health Insurance and Medical Expenses (provided that they qualify for either of these deductions). Clients will also be able to use DTA Connect to change the preferred language, phone number, and/or e-mail address (unlike address and expenses, these updates will feed into BEACON without the requirement to wrap-up).
  - **Address Reporting Enhancements:** Clients can separately update residential and mailing address. DTA Connect will also be able to detect if an address belongs to the Address Confidentiality Program (ACP) and check the ACP flag in BEACON. When a client updates a residential address, DTA Connect will prompt them to enter shelter and SUA information. DTA Connect will require clients to provide a mailing address, and to indicate whether they are homeless.
  - **SLAM Pop-up:** DTA Connect monitors cases for SLAM (Suspected Living Above Means) situations whenever someone updates shelter or dependent care costs. If a household's total shelter and dependent care expenses exceed their monthly gross income on record, DTA Connect will generate a pop-up message to confirm if the expense(s) was entered correctly.
  - **Limited Capacity to Update Information on Closed Cases:** For cases that are closed or denied, clients will only be able to use DTA Connect to update their phone number, e-mail address, preferred language, and/or mailing address.
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**Cross Program  
Enhancements  
(Continued)**

- **Datasheet:** To establish a written record of what the client reported via DTA Connect, BEACON will feed what the client reported into a datasheet/web form that is created whenever a client reports changes through the online portal or mobile app. The datasheet will denote the change that the client reported/self-declared on DTA Connect. Once generated, the datasheet(s) will be available under the case's Client Communications page in BEACON.
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**SNAP-only  
Enhancements**

The DTA Connect My Info page enhancements include the following SNAP-only enhancements:

- **Gross Income Summary:** In addition to the types of case information that will display for all DTA programs on DTA Connect, active SNAP-only households will have a summary of their household's total monthly gross income on file, including income types/items by household member.
  - **Display of Medical Expenses:** For households with an elderly and/or disabled member who has medical expenses on file, medical expenses will be indexed from BEACON to DTA Connect and displayed in a summary section, including insurer type, expense type, amount, frequency, etc. This will allow clients to see what the Department has on record. Clients can edit or delete recurring medical expenses (e.g., health insurance, prescriptions). Clients can add new medical expenses regardless of recurrence.
  - **Medical Expense Pop-up Reminder:** If a client adds medical expenses and the monthly total is under \$35, DTA Connect will display a pop-up message telling them to submit medical expenses even if they have items not covered in the DTA Connect medical expense questions. If a client adds medical expenses and the monthly total is above \$190, DTA Connect will display a pop-up message telling them that they must submit verification to be credited with medical expenses above \$190 per month.
  - **Electronic Self-Declaration/Medical Attestation:** If a client reports monthly medical expenses over \$190 on DTA Connect, DTA Connect will prompt the client to electronically sign a self-declaration/medical attestation that their medical expenses are at least \$35 per month. If the client subsequently adds more medical, a hard-edit in DTA Connect will prevent them from having to re-sign the electronic self-declaration. These reported changes will be included in a data sheet available in the case's Client Communications page in BEACON.
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**SNAP-only  
Enhancements  
(Continued)**

- **Reminder of Reporting Requirements:** For EDSAP households and SIMP-12 households with no elderly and/or disabled member, DTA Connect will display a quarterly reminder of the household's reporting requirements.
  - **Bay State CAP (BSC) Households:** Due to reporting requirements, BSC households will be limited in what they can view and edit on DTA Connect. They will be able to view the About Us and Residential Address sections. They will be able to view and edit the Contact Information and Mailing Address sections.
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**New View for  
TAFDC, EAEDC,  
or Combo Cases**

If a TAFDC or EAEDC (or combo) client uses DTA Connect to update their case information, the grantee will appear on a new BEACON view for the case manager called **Client Info Update DTA Connect**.

If the client uses DTA Connect to update multiple items, the multiple data changes will result in multiple records appearing for the same client on the Client Info Update DTA Connect view.

Once the case manager enters the grantee's case, the data that the client provided on DTA Connect will appear in the relevant BEACON pages, which will have a hard edit requiring the case manager to visit.

Once the case manager visits all pages requiring editing, review the entire case to determine if any additional questions arise based on the DTA Connect updates, verify all the updates on the verification tab (if required), and wrap the client's case, a pop up to disposition all items updated by the client will appear. Choosing "Yes" to this pop up will auto-disposition the view item for the assigned case, upon completion of the wrap up.

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**Autowrapping**

When a SNAP-only client in the FAW model reports a change in DTA Connect that does not require worker intervention, BEACON will automatically wrap (i.e., autowrap) the change. Autowrapping applies to reported change(s) in the following:

- Residential address (if the address is public or private, in-state, and validated). If the address is not validated, BEACON will create the existing Validate Address action.
  - Shelter costs (if the amounts do not result in a SLAM case)
  - SUA
  - Dependent care costs (if the type is not car mileage, the reason for the cost is provided, and the amounts do not result in a SLAM case)
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**Autowrapping  
(Continued)**

- Recurring medical costs greater than \$35 per month, and less than or equal to \$190 per month.

On the day the client uses DTA Connect to update their information during case maintenance, if the changes meet the criteria for autowrapping, BEACON will run a batch in the evening so that the changes are effective the next day.

Autowrapping only applies to SNAP-only cases at case maintenance. If a case is a pending application or recertification, then BEACON will not autowrap the case even if the autowrap conditions are otherwise met.

Additionally, if a client reports multiple changes via DTA Connect and at least one change cannot be autowrapped, none of the changes will be autowrapped (so that BEACON will only generate one notice for all the changes). If a client reports multiple changes resulting in multiple actions, the FAW who takes the first Action must check for Outstanding Actions and self-assign all Actions related to the case they are working on. FAW is responsible for taking the case as far as they can by processing all other DTA-Connect-related actions.

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**New Actions for  
SNAP-only  
Cases Assigned  
to FAW**

If a SNAP-only client in the FAW model uses DTA Connect to update their case information and the update cannot be autowrapped (where wrap-up is otherwise required), BEACON will create an Action for a FAW to review the case. The type of Action will depend on the change the client is reporting. FAWs who receive any of these Actions must perform the appropriate follow-up with the client to address the reported change. The Actions are as follows:

- **DTA Connect – Reported Change.** This will appear whenever a client reports changes on DTA Connect during application, recertification, or IR. BEACON will display the pencil icon on the page related to the reported change to remind staff to revisit the page.
  - **DTA Connect – Housing Type Other.** This will appear if the client reports a residential address change and selects “Other” for address type.
  - **DTA Connect – Out of State Address.** This will appear if a client reports a residential address change and the address is outside Massachusetts.
  - **DTA Connect – ACP Ended Update Residential.** This will appear if a client reports a mailing address change while they are already flagged as part of the Address Confidentiality Program.
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**New Actions for  
SNAP-only  
Cases Assigned  
to FAW  
(Continued)**

- **DTA Connect – SLAM Review.** This will appear if the client updates their shelter and/or dependent care costs, but the combined monthly amounts are above their total monthly gross income on record. During case maintenance, the purpose of this Action is for staff to ensure that the client did not enter incorrect amounts on DTA Connect (e.g., mistakenly entering “\$10,000” instead of “\$1,000”).
- **DTA Connect – Dependent Care Mileage.** This will appear if the client reports mileage related to dependent care costs.
- **DTA Connect – Dependent Care Reason.** This will appear if the client updates their dependent care costs but does not specify one of the eligible reasons for these costs.
- **DTA Connect – Family Health Insurance.** This will appear if the client reports that they have private health insurance (or MassHealth) on a family plan. The FAW must perform a proration calculation to determine the appropriate amount for the eligible household member(s).
- **DTA Connect – Medical Expense Mileage.** This will appear if the client reports mileage related to medical costs.
- **DTA Connect – Medical Expense Non-recurring.** This will appear if the client adds a new non-recurring medical expense.
- **DTA Connect – Medical Expenses greater than \$190.** This will appear if the client reports one or more medical expenses that cause the household’s medical expense total to go above \$190 per month. This Action allows the FAW to send a VC-1 for medical expenses and credit the household with the SMD (if not already credited), pending receipt of the full medical expense verification.
- **DTA Connect – Optional Shelter/SUA VC-1.** This will appear if the client updates their residential address without updating their shelter costs and/or SUA.

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**Health Insurance  
Information for  
TAFDC and  
EAEDC:**

If a client uses DTA Connect to add a new health insurance or update an existing health insurance record, this information does not include the policy number. In such cases, you will need to contact the client to obtain the policy number. If your attempts to reach the client via phone are unsuccessful, you must send a VC-1 letter. In case you do not take action within 10 days of the reported change, BEACON will automatically generate a VC-1 letter. The VC-1 letter will include a new item called Proof of Health Insurance Information.

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**Updates to the  
Dependent Care  
Page**

To coincide with the updates in DTA Connect related to dependent care, the Dependent Care Expense page in BEACON has been enhanced as follows:

- The Reason dropdown list includes a new list of options for indicating why the household qualifies for the dependent care deduction (e.g., employed, has a disability).
- The page now includes a new Type dropdown list for indicating whether the cost is related to dependent care, mileage, parking/tolls, or any other transportation.
- The selections for IECC or Non-IECC have been replaced with a Subsidized field (optional) for indicating whether the dependent care cost is subsidized or unsubsidized.
- The Countable cash and Countable FS fields will now default to Yes. (For TAFDC/EAEDC staff, this is to ensure that clients get the maximum SNAP amount.) The radio buttons options for Incapacitated Dependent, Cash eligible deduction, and FS eligible deduction have been removed.

When the changes to the Dependent Care page go live, the Subsidized field will indicate Yes if previous entry was IECC and No if it was Non-IECC. If the previous selection for Type was IECC or Non-IECC, the new default will be “Dependent Care.”

All other obsolete dropdown selections will remain in place until staff review the case, at which time they must delete the existing record and create a new record with the updated dropdown selection.

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**SNAP Policy  
Clarification for  
Reported  
Address Change**

The DTA Connect address reporting enhancements coincide with the following policy/procedural clarification from FNS: Whenever a SNAP client reports during case maintenance that they have a new residential address, their shelter and utility expenses must also be updated. When a client reports a change of residential address on DTA Connect, their existing shelter and utility expenses will be removed and they will be asked for their new shelter and utility expenses.

When a client reports a change of residential address, either telephonically or via a document in EDM, staff must follow-up with the client. If staff are on the phone with the client, they must ask the client to telephonically self-declare their shelter and utility expenses.

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**SNAP Policy  
Clarification for  
Reported  
Address Change  
(Continued)**

If staff are unable to obtain the telephonic self-declaration of shelter and utility expenses, they must send an optional VC-1 for both items, remove the existing shelter and utility expenses (if the change was reported through DTA Connect the expenses will be removed automatically), and wrap the case to recalculate the benefits.

If the client subsequently submits verification, the FAW who receives the Action must update BEACON, delete the pending wrap-up for the removal of shelter and utility expenses, and re-wrap the case to recalculate the SNAP benefits. If the client subsequently reports the shelter and utility expense changes on DTA Connect and there is no SLAM, the case will be autowrapped.

In this scenario, clients will retain existing credits for H-EAT or LIHEAP based on existing rules.

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**New Online  
Guide Pages**

<b>Topic:</b>	Self-Service Options
<b>Page:</b>	DTA Connect: My Info Page
<b>Topic:</b>	Self-Service Options
<b>Page:</b>	DTA Connect: Updating Address
<b>Topic:</b>	Self-Service Options
<b>Page:</b>	DTA Connect: Updating Dependent Care Expenses
<b>Topic:</b>	Self-Service Options
<b>Page:</b>	DTA Connect: Updating Medical Expenses and Health Insurance Information
<b>Topic:</b>	Self-Service Options
<b>Page:</b>	DTA Connect: Updating Shelter Expenses and/or Utility Expenses

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**Revised Online  
Guide Pages**

<b>Topic:</b>	Self-Service Options
<b>Page:</b>	DTA Connect Online
<b>Topic:</b>	Self-Service Options
<b>Page:</b>	DTA Connect Overview

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Revised Online  
Guide Pages  
(Continued)

**Topic:** SNAP  
**Book:** Expenses and Deductions  
**Chapter:** Dependent Care Expenses  
**Page:** Entering Dependent Care Expenses Data - SNAP

**Topic:** SNAP  
**Book:** Expenses and Deductions  
**Chapter:** Dependent Care Expenses  
**Page:** Dependent Care Expenses Deduction

**Topic:** SNAP  
**Book:** Expenses and Deductions  
**Chapter:** Health Insurance/Medical Expenses  
**Subchapter:** Medical Expenses  
**Page:** Health Insurance Costs

**Topic:** SNAP  
**Book:** Expenses and Deductions  
**Chapter:** Health Insurance/Medical Expenses  
**Subchapter:** Medical Expenses  
**Page:** Transportation Related Costs

**Topic:** SNAP  
**Book:** Expenses and Deductions  
**Chapter:** Health Insurance/Medical Expenses  
**Subchapter:** Medical Expenses  
**Page:** Non-Recurring Medical Expenses

**Topic:** SNAP  
**Book:** Certification Types  
**Chapter:** Simplified Reporting  
**Page:** Simplified Reporting - Recertification

**Topic:** SNAP  
**Book:** Certification Types  
**Chapter:** Simplified Reporting  
**Page:** Simplified Reporting – Interim Report

**Topic:** SNAP  
**Book:** Certification Types  
**Chapter:** Simplified Reporting  
**Page:** Simplified Reporting Examples

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**Revised Online  
Guide Pages  
(Continued)**

**Topic:** SNAP  
**Book:** Application Processing  
**Chapter:** SNAP Application Processing  
**Page:** SNAP Application Processing

**Topic:** SNAP  
**Book:** Certification Types  
**Chapter:** Simplified Reporting  
**Page:** Simplified Reporting During Case Maintenance

**Topic:** Cross Programs  
**Book:** Verifications  
**Chapter:** Verification Types  
**Page:** Verification Chart

**Topic:** Cross Programs  
**Book:** Verifications  
**Chapter:** Verification Methods  
**Page:** Self-Declarations

**Topic:** EAEDC  
**Book:** Basic Case Activities & Maintenance  
**Chapter:** Reevaluations  
**Page:** Reevaluations Case Manager Responsibilities

**Topic:** EAEDC  
**Book:** Basic Case Activities & Maintenance  
**Chapter:** Views  
**Page:** Daily Priority Actions Views

**Topic:** TAFDC  
**Book:** Basic Case Activities & Maintenance  
**Chapter:** Reevaluations  
**Page:** Reevaluations Case Manager Responsibilities

**Topic:** TAFDC  
**Book:** Basic Case Activities & Maintenance  
**Chapter:** Views  
**Page:** Daily Priority Actions Views

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**Revised Online  
Guide Pages  
(Continued)**

**Topic:** TAFDC  
**Book:** Employment  
**Chapter:** Employment  
**Page:** Dependent Care Deduction

**Topic:** Business Process (BP)  
**Book:** Procedures  
**Chapter:** Processing Procedures  
**Page:** Completing Unvalidated Address Change Requests (SNAP)

**Topic:** Cross Program  
**Book:** Verifications  
**Chapter:** Verification Methods  
**Page:** Self-Declarations

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**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](#).

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

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