



DTA myWorkspace (MWS)

User Guide

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DTA myWorkspace (MWS) Overview

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 Department of Transitional Assistance (DTA) have initiated a comprehensive effort to identify and implement near-term and long-term operational improvements.

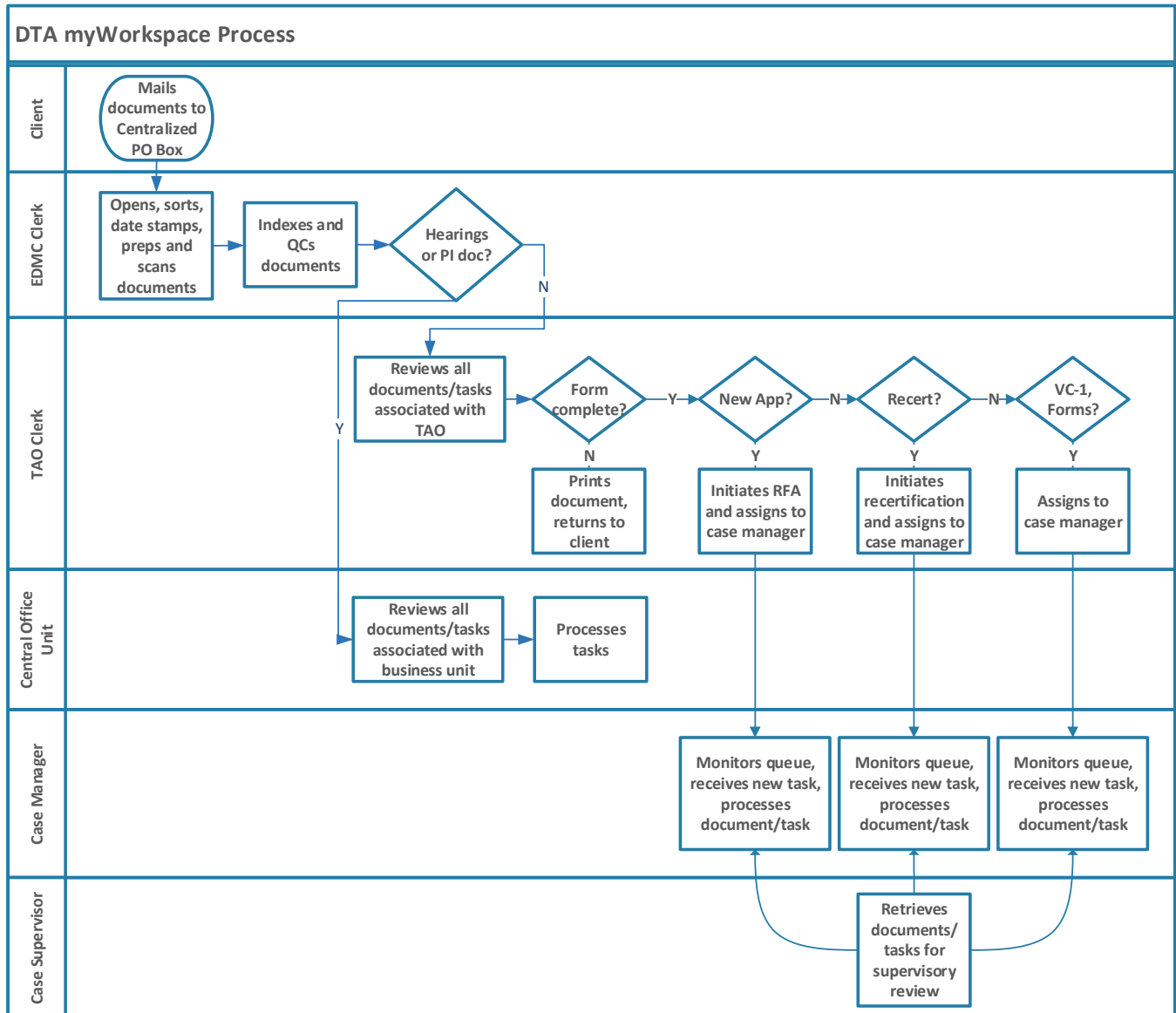
The overall goals of this project include the following:

- 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

As part of this effort, the Department is implementing an Electronic Document Management (EDM) system. DTA myWorkspace (MWS) is the web-based application that DTA staff will utilize to view and route scanned documents. The following sections detail how to access, assign and work tasks in the MWS application.

MWS Business Process Workflow

The following diagram provides a high-level overview of the DTA myWorkspace business process. For more detailed information on the business process and Department procedures, please see the published Field Operations memos.

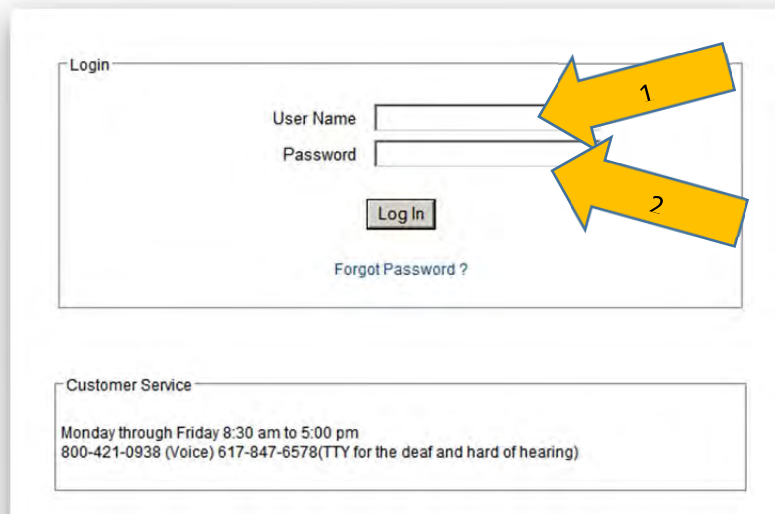


Logging into MWS

MWS can be accessed through the following URL: <https://service.hhs.state.ma.us/edm/>.

Once a user has opened MWS in his or her internet web browser, the login page will be displayed. To access MWS, complete the following steps:


1. Type in your login ID, which is the same as your weldid.
2. Type in your password.




The screenshot shows a login form with the following elements:

- A "Login" header above the form.
- Two input fields: "User Name" and "Password".
- A "Log In" button below the password field.
- A "Forgot Password?" link below the "Log In" button.
- A "Customer Service" section at the bottom with contact information: "Monday through Friday 8:30 am to 5:00 pm" and "800-421-0938 (Voice) 617-847-6578 (TTY for the deaf and hard of hearing)".

Two yellow arrows with numbers 1 and 2 point to the "User Name" and "Password" input fields, respectively.

 MWS passwords require **eight characters**, including at least **one number**, **one special character** and **one capital letter**.

 See "Using Profile Edit" section for additional instruction on how to change your password. See "Using Forget Password" to reset your password.



For technical assistance, contact Customer Service using information found on the login page. Note that you can reset your password through the “Forgot Password?” function.

The screenshot shows a login form with the following elements:

- Login** header
- User Name** text label and an input field
- Password** text label and an input field
- Log In** button
- Forgot Password ?** link

Below the login form is a **Customer Service** box containing the following text:

Monday through Friday 8:30 am to 5:00 pm
800-421-0938 (Voice) 617-847-6578(TTY for the deaf and hard of hearing)

Two yellow arrows are overlaid on the image: one points to the "Forgot Password ?" link, and the other points to the "Customer Service" box.

Navigating MWS

MWS navigation consists of three main tabs, including:

- **myWorkflows** – This tab displays tasks that have been assigned to the user. It shows both tasks that are waiting to be processed and tasks that have been completed during the day.
- **Search Tasks** – The Search Tasks tab allows the user to search through all the tasks within myWorkspace. Users can use several criteria to narrow their search.
- **Profile Edit** – The Profile Edit tab allows users to change their password.

The screenshot shows the DTA MyWorkspace interface. At the top, it says "Executive Office of Health and Human Services" and "Mass.gov". The user is identified as "Gulliver Perriweather" and the date is "January 10, 2014". The navigation tabs are "myWorkflows", "Search Tasks", and "Profile Edit", all of which are circled in red. Below the tabs, there are "myMetrics" and "myWorkflow" sections. The "myWorkflow" section shows a table of active tasks.

Folder ID	Task Category	Document Type	Release Date	Date Received	Office	AP ID	Last Name	First Name	Status
5002031	SNAP Recertification	Your SNAP Recertification Form		12/13/2013	Holyoke	5002031	Doe	Jane	Assigned
5007436	Case Maintenance	SNAP Change Report Form		12/13/2013	Lowell	5007436	FIRSTV	LASTV	Assigned
5007377	SNAP Recertification	Your SNAP Recertification Form		12/13/2013	Fitchburg	5007377	FIRSTV	LASTV	Assigned
5002243	SNAP Application	SNAP Benefits Application		12/13/2013	Holyoke	5002243	Doe	John	Assigned



NOTE: While navigating MWS, **do not** use back and forth arrows in web browser. Only use buttons and links within the MWS application.



Using myWorkflows

Once you have successfully logged in, you will be taken to the **myWorkflows** tab, which allows users to monitor tasks assigned to them.

The **myMetrics** box provides a summary of Active tasks.

The myWorkflow box contains 2 tabs, **Active** and **Completed Today**.

1. The **Active** tab shows a user's tasks that need to be processed. By clicking on the "Folder ID" link, you will be taken to the Task Summary page for more detailed information about the task.
2. The **Completed Today** tab displays all task completed by the user throughout the day.

The **myMetrics** box provides a summary of Active tasks.

The screenshot displays the DTA MyWorkspace interface. At the top, it says "Executive Office of Health and Human Services" and "Mass.gov". The user is identified as "Gulliver Perrinweather" with the date "January 10, 2014" and office location "Holyoke". The main navigation bar includes "myWorkflows", "Search Tasks", and "Profile Edit".

The **myMetrics** section shows:

- myTasks (Assigned / In Process): 4
- myTasks (Hold): 0

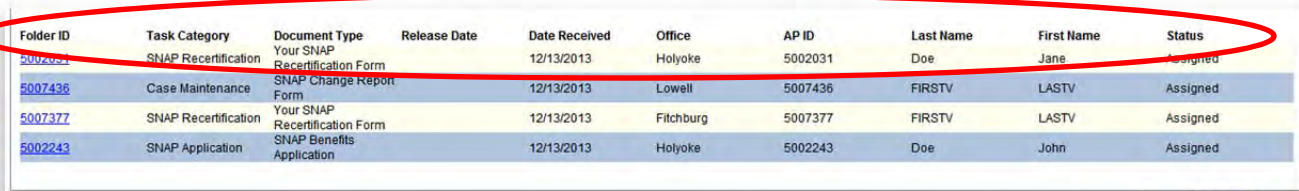
A yellow arrow points to this section. Below it, the **myWorkflow** section has two tabs: **Active (4)** and **Completed Today (0)**. The **Active (4)** tab is selected, showing a table of tasks.

Folder ID	Task Category	Document Type	Release Date	Date Received	Office	AP ID	Last Name	First Name	Status
5002031	SNAP Recertification	Your SNAP Recertification Form		12/13/2013	Holyoke	5002031	Doe	Jane	Assigned
5007436	Case Maintenance	SNAP Change Report Form		12/13/2013	Lowell	5007436	FIRSTV	LASTV	Assigned
5007377	SNAP Recertification	Your SNAP Recertification Form		12/13/2013	Fitchburg	5007377	FIRSTV	LASTV	Assigned
5002243	SNAP Application	SNAP Benefits Application		12/13/2013	Holyoke	5002243	Doe	John	Assigned

At the bottom, there is a footer with copyright information: "© 2010 Commonwealth of Massachusetts" and "Build 8.5".

The following Information about each task is displayed on the myWorkflow box on the myWorkflows page.

- Folder ID
- Task Category
- Document Type
- Release Date
- Date Received
- Office
- AP ID
- Last Name
- First Name
- Status



Folder ID	Task Category	Document Type	Release Date	Date Received	Office	AP ID	Last Name	First Name	Status
5002031	SNAP Recertification	Your SNAP Recertification Form		12/13/2013	Holyoke	5002031	Doe	Jane	Assigned
5007436	Case Maintenance	SNAP Change Report Form		12/13/2013	Lowell	5007436	FIRSTV	LASTV	Assigned
5007377	SNAP Recertification	Your SNAP Recertification Form		12/13/2013	Fitchburg	5007377	FIRSTV	LASTV	Assigned
5002243	SNAP Application	SNAP Benefits Application		12/13/2013	Holyoke	5002243	Doe	John	Assigned

Using Search Tasks

The **Search Tasks** tab allows users to search for tasks regardless of the task status or office location.

Executive Office of Health and Human Services

Mass.gov

Welcome to DTA MyWorkspace!
User: Gulliver Perriweather

January 10, 2014
Office Location: Holyoke

myWorkflows **Search Tasks** Profile Edit

Task Search:

Last Name: First Name: AP ID:
SSN: - - Date of Birth: MM / DD / YYYY

Folder ID: Status: Office:
Task Category: Disposition: Assigned To:

Date Received From: MM / DD / YYYY Date Received To: MM / DD / YYYY

Disposed Date From: MM / DD / YYYY Disposed Date To: MM / DD / YYYY

[Logout DTA MyWorkspace!](#)

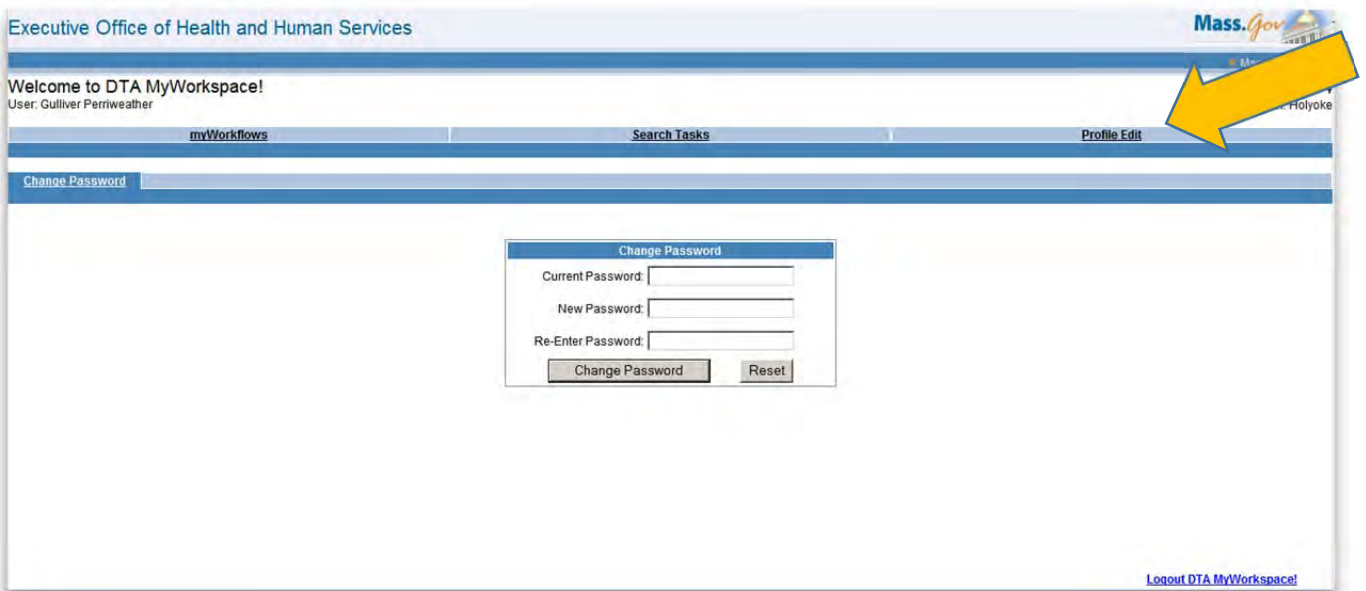
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Tasks may be searched on using combinations of the following criteria:

- Last Name
- First Name
- AP ID
- SSN
- Date of Birth
- Folder ID
- Status
- Office
- Task Category
- Disposition
- Assigned To
- Received Date From/To
- Disposed Date From/To

Using Profile Edit

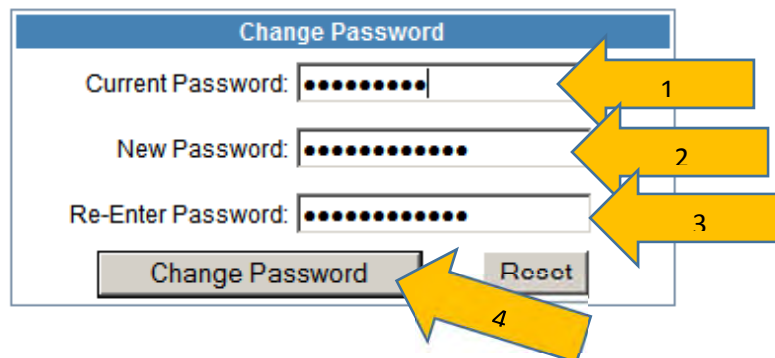
The **Profile Edit** tab allows users to modify their password.



The screenshot shows the DTA MyWorkspace interface. At the top, it says "Executive Office of Health and Human Services" and "Mass.gov". Below that, it says "Welcome to DTA MyWorkspace!" and "User: Gulliver Perriweather". There are three tabs: "myWorkflows", "Search Tasks", and "Profile Edit". A yellow arrow points to the "Profile Edit" tab. Below the tabs, there is a "Change Password" section with a form containing three text boxes: "Current Password:", "New Password:", and "Re-Enter Password:". There are two buttons: "Change Password" and "Reset". A "Logout DTA MyWorkspace!" link is visible in the bottom right corner.

The steps for changing your password include:

1. Input your current password in the Current Password textbox.
2. Type in a new password into the New Password text box.
3. Type in the new password again to confirm in the Re-Enter New Password text box.
4. Click "Change Password" button.



A close-up of the "Change Password" form. The form has three text boxes: "Current Password:", "New Password:", and "Re-Enter Password:". Each text box contains a series of dots representing a password. There are two buttons: "Change Password" and "Reset". Four yellow arrows with numbers 1, 2, 3, and 4 point to the text boxes and the "Change Password" button respectively.



It is recommended that your Beacon and MWS passwords are the same, and that you change your password in MWS each time you are prompted to change it in BEACON to assist staff in remembering the password. The "Reset" button will clear out all information previously typed in the text boxes.

Accessing and Reviewing Tasks

There are multiple ways to access and review tasks.

To access or review a task that *has been assigned to you*:

1. Click the **myWorkflows** tab.
2. In the myWorkflow box, click on the “Folder ID” of the task that you want to review.

The screenshot shows the 'myWorkflows' interface. At the top, there are two tabs: 'myWorkflows' and 'Search Tasks'. Below the tabs, there is a 'myMetrics' section showing 'myTasks (Assigned / In Process): 4' and 'myTasks (Hold): 0'. Below that is a 'myWorkflow' section with a sub-tab 'Active (4)'. A table lists four tasks with columns for Folder ID, Task Category, Document Type, Release Date, Date Received, and Office. A yellow arrow labeled '1' points to the 'myWorkflows' tab, and another yellow arrow labeled '2' points to the 'Folder ID' column header.

Folder ID	Task Category	Document Type	Release Date	Date Received	Office
5002031	SNAP Recertification	Your SNAP Recertification Form		12/13/2013	Holyoke
5007436	Case Maintenance	SNAP Change Report Form		12/13/2013	Lowell
5007377	SNAP Recertification	Your SNAP Recertification Form		12/13/2013	Fitchburg
5002243	SNAP Application	SNAP Benefits Application		12/13/2013	Holyoke

3. The **Task Summary** page will be displayed.

The screenshot shows the 'Task Summary' page. At the top, there are three tabs: 'myWorkflows', 'Search Tasks', and 'Profile Edit'. Below the tabs, there is a 'Task Summary' section. The 'Workflow Information' section shows 'Status: Assigned', 'Received Date: 12-13-2013', 'Task Category: SNAP Recertification', 'Disposition:', 'Routing Notes:', 'Assigned To: Gulliver Perriweather', 'Office: Holyoke', 'Notes:', and 'Disposition Date:'. A yellow arrow labeled '3' points to the 'Workflow Information' section. Below this is the 'Assignment Summary' section, which shows a table of assignments. At the bottom, there is a 'Your SNAP Recertification Form' section with 'Client Information' and 'Document Information'.

Assigned To:	Assigned By:	Assigned Date:
Gulliver Perriweather	Gulliver Perriweather	01-10-2014
Gulliver Perriweather	Ezra Sykes	01-10-2014
Ezra Sykes	PCG Business Administrator	01-10-2014
Ezra Sykes	Ezra Sykes	01-06-2014
Ezra Sykes	Ezra Sykes	01-06-2014
Lisa Byrd	Lisa Byrd	12-19-2013

To view the document attached to a task assigned to you, first click the “Work Task” button at the bottom of the screen to see the links to the documents. See “Viewing Documents” section for more information.

To access or review a task that *has not been assigned to you*:

1. Click the **Search Tasks** tab.
2. Enter search criteria.
3. Click “Search Tasks” button.

The screenshot shows the 'Search Tasks' form in the myWorkflows application. The form includes fields for Last Name, First Name, AP ID, SSN, Date of Birth, Folder ID, Status, Disposition, Office, Assigned To, Date Received From/To, and Disposed Date From/To. There are 'Search Tasks' and 'Reset Search' buttons at the bottom. Three yellow arrows are overlaid on the form: arrow 1 points to the 'Search Tasks' tab, arrow 2 points to the search criteria fields, and arrow 3 points to the 'Search Tasks' button.

4. View results.
5. Click on the “Folder ID” of the task that you want to review.

The screenshot shows the 'Task Results' section of the application. It displays a table with columns for Folder ID, Release Date, Date Received, Office, AP ID, SSN, Last Name, First Name, DOB, Status, Assigned To, and Envelope Info. Three rows of results are visible. Two yellow arrows are overlaid: arrow 4 points to the 'Task Results' section, and arrow 5 points to the 'Folder ID' column of the first row.

<input type="checkbox"/>	Folder ID	Release Date	Date Received	Office	AP ID	SSN	Last Name	First Name	DOB	Status	Assigned To	Envelope Info
<input type="checkbox"/>	4003129	Callon	12/13/2013	Holyoke	4003129	060073129	FIRSTV	LASTV	5/5/1990	New		Envelope Notes
<input type="checkbox"/>	MWS-77248	Application SNAP	12/13/2013	Holyoke	5002243	060072243	FIRSTV	LASTV	5/5/1990	New		Envelope Notes
<input type="checkbox"/>	MWS-77249	Application	12/13/2013	Holyoke	5002031	060072031	FIRSTV	LASTV	5/5/1990	New		Envelope Notes

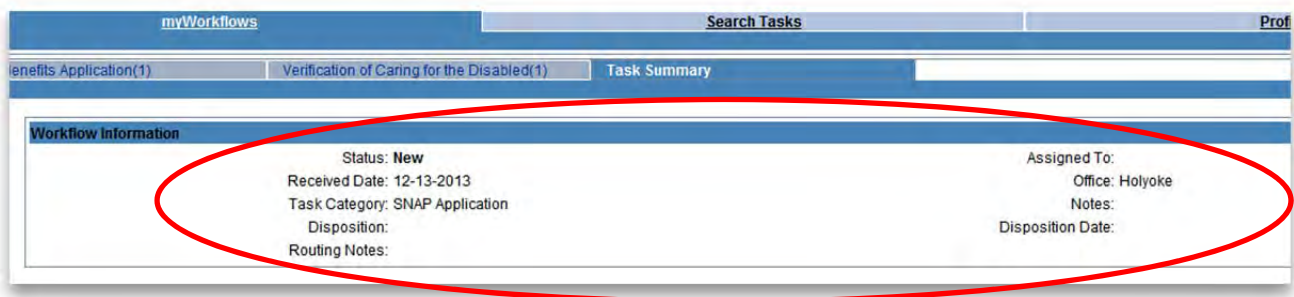
6. You will be taken to the **Task Summary** page.

The screenshot displays the 'Task Summary' page with the following sections:

- Workflow Information:** Status: New, Received Date: 12-13-2013, Task Category: SNAP Application, Disposition: , Routing Notes: , Assigned To: Office: Holyoke, Notes: , Disposition Date: , Folder ID: 4003129
- Assignment Summary:** Assigned To: Arianna Curet, Assigned By: Arianna Curet, Assigned Date: 01-10-2014, Task ID: 75672
- SNAP Benefits Application:** Client Information: First Name: LASTV, Last Name: FIRSTV, SSN: 060-07-3129, Date of Birth: 05-05-1990, AP ID: 4003129; Document Information: Folder ID: 4003129, Document Source: EDMC, Document Size: 1215 KB, Document Category: SNAP Application, Document Type: SNAP Benefits Application, Document Processed?: , Document Notes: , Document ID: 0901cee80175acb
- Verification of Caring for the Disabled:** Client Information: First Name: LASTV, Last Name: FIRSTV, SSN: 060-07-3129, Date of Birth: 05-05-1990, AP ID: 4003129; Document Information: Folder ID: 4003129, Document Source: EDMC, Document Size: 1215 KB, Document Category: Verification, Document Type: Verification of Caring for the Disabled, Document Processed?: , Document Notes: , Document ID: 0901cee801762a7

The Task Summary includes important information about the task and related document (s). The Task Summary includes **Workflow Information**, including:

- Status (of the Task)
- Received Date
- Task Category
- Disposition
- Routing Notes
- Assigned To
- Office
- Notes
- Disposition Date



Each document within a task includes **Client Information** and **Document Information** such as:

- Client Information
 - First Name
 - Last Name
 - SSN
 - Date of Birth
 - AP ID

- Document Information
 - Folder ID
 - Document Source
 - Document Size
 - Document Category
 - Document Type
 - Document Processed?
 - Document Notes



Viewing Documents

Each task will include one or more documents. In order to view documents, look at the tabs, and click on the hyperlink with the document's name. You must click on the document name, not just on the tab.

Welcome to DTA MyWorkspace!
User: Gulliver Perriweather

January 10, 2014
Office Location: Holyoke

myWorkflows Search Tasks Profile Edit

Your SNAP Recertification Form(1) Task Summary

Workflow Information Folder ID: 5007377

Status: In Process
 Received Date: 12-13-2013
 Task Category: SNAP Recertification
 Disposition:
 Routing Notes:

Assigned To: Gulliver Perriweather
 Office: Fitchburg
 Notes:
 Disposition Date:

Edit Task Information

Assignment Summary Task ID: 77068

Assigned To: Gulliver Perriweather
 Assigned By: Gulliver Perriweather
 Gulliver Perriweather
 Ezra Sykes
 Assigned Date: 01-10-2014
 01-10-2014

Your SNAP Recertification Form Document ID: 0901ceee801768ff

Client Information:
 First Name: LASTV
 Last Name: FIRSV
 SSN: 060-07-7377
 Date of Birth: 05-05-1990
 AP ID: 5007377

Document Information:
 Folder ID: 5007377
 Document Source: EDMC
 Document Size: 366 KB
 Document Category: SNAP Recertification
 Document Type: Your SNAP Recertification Form
 Document Processed?:
 Document Notes:

Disposition: [Dropdown] Notes: [Text Box] Save Notes Complete Task

The Document Information will be displayed.

Executive Office of Health and Human Services

Mass.gov

myWorkflows Search Tasks Profile Edit

Task Summary Your SNAP Recertification Form(1)

Client Information:
 First Name: LASTV
 Last Name: FIRSV
 SSN: 060-07-7377
 Date of Birth: 05-05-1990
 AP ID: 5007377

Document Information:
 Folder ID: 5007377
 Document ID: 0901ceee801768ff
 Document Source: EDMC
 Document Size: 366 KB
 Document Category: SNAP Recertification
 Document Type: Your SNAP Recertification Form

Edit Index

5. Waiver of the Face-to-Face Interview

If you are unable to come to the DTA office for an interview, please check all reasons that apply.

Elderly/Disabled Transportation Problems Work during DTA office hours
 Child Care/Care of Disabled Household Member Other _____

IMPORTANT: Be sure to list your telephone number(s) on page 1. We need to be able to call you if we have questions about your application or have to interview you over the phone.

6. Questions Regarding Citizenship Status

a. Are you and all household members U.S. citizens by birth or naturalization? yes no
 If Yes, go to Question 7. If No, go to Part b. below.

b. Under SNAP rules (105 CMR 362.220), a noncitizen who is unable or unwilling to provide immigration status information and/or Social Security number due to immigration status does not need to do so. This noncitizen will be ineligible for SNAP benefits. However, the remaining members of the household may apply for benefits.

1. List any household member(s) who chooses NOT to apply for SNAP benefits:

2. Check here if all members choose to apply.

7. Information About People You Live With - Please list everyone you live with. Do not include yourself. (Attach a separate sheet if necessary.) Noncitizens living with you who choose not to apply for SNAP benefits do not need to tell us their Social Security number or immigration status.

Last Name	First Name	Middle Initial	Date of Birth	Gender	Relationship to you
				<input type="checkbox"/> M <input type="checkbox"/> F	

On the top of the document, the following document information will appear.

- **Client Information**
 - First Name
 - Last Name
 - SSN
 - Date of Birth
 - AP ID
- **Document Information**
 - Folder ID
 - Document ID
 - Document Source
 - Document Size
 - Document Category
 - Document Type
 - Processed? (at the bottom of the page, ONLY if there is more than one document associated with the task)

The screenshot shows a web-based form titled "Your SNAP Recertification Form(1)". A red oval highlights the top section containing client and document information. Below this, the form includes sections for a waiver of a face-to-face interview, citizenship status questions, and information about household members.

Client Information:		Document Information:	
First Name: LASTV	Folder ID: 5007377	Document ID: 0901cdee801768ff	Document Source: EDMC
Last Name: FIRSTV	Document Size: 366 KB	Document Category: SNAP Recertification	Document Type: Your SNAP Recertification Form
SSN: 060-07-7377			
Date of Birth: 05-05-1990			
AP ID: 5007377			

5. Waiver of the Face-to-Face Interview
If you are unable to come to the DTA office for an interview, please check all reasons that apply.
 Elderly/Disabled Transportation Problems Work during DTA office hours
 Child Care/Care of Disabled Household Member Other _____
IMPORTANT: Be sure to list your telephone number(s) on page 1. We need to be able to call you if we have questions about your application or have to interview you over the phone.

6. Questions Regarding Citizenship Status
a. Are you and all household members U.S. citizens by birth or naturalization? yes no
If Yes, go to Question 7. If No, go to Part b, below.
b. Under SNAP rules (106 CMR 362.220), a noncitizen who is unable or unwilling to provide immigration status information and/or Social Security number due to immigration status does not need to do so. This noncitizen will be ineligible for SNAP benefits. However, the remaining members of the household may apply for benefits.
1. List any household member(s) who chooses NOT to apply for SNAP benefits:

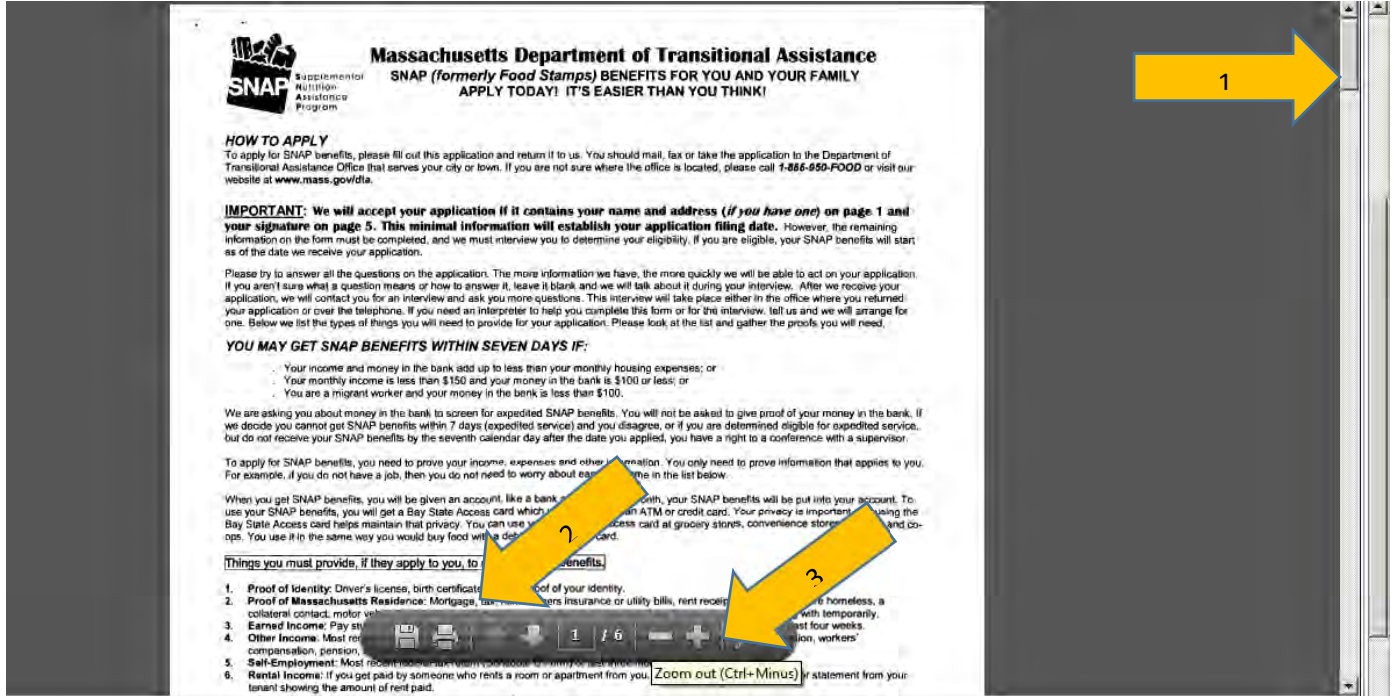
2. Check here if all members choose to apply:

7. Information About People You Live With - Please list everyone you live with. Do not include yourself. (Attach a separate sheet if necessary.) Noncitizens living with you who choose not to apply for SNAP benefits do not need to tell us their Social Security number or immigration status.

Last Name	First Name	Middle Initial	Date of Birth	Gender	Relationship to you
				<input type="checkbox"/> M <input type="checkbox"/> F	

Documents are displayed in PDF format and cannot be altered. To review the document:

1. Use the innermost scroll bar to scroll up or down.
2. Hover your mouse near the bottom of the PDF display.
3. Use the PDF toolbar to zoom in or zoom out.



The PDF reader allows users to save documents to their desktops or to any other drive.

Completing a Task

After you have completed your review of the document and taken necessary action (entered information into BEACON, for example) you will need to complete – or “dispose of” – the task:

1. From the **Task Summary** tab, click the “Work Task” button.

The screenshot shows the 'Task Summary' tab for a 'SNAP Change Report Form'. The interface includes a top navigation bar with 'myWorkflows', 'Search Tasks', and 'Profile Edit'. The main content area is divided into three sections: 'Workflow Information', 'Assignment Summary', and 'SNAP Change Report Form'. At the bottom, there are controls for 'Select user by Office' (set to 'Holyoke'), 'Deliver To User', 'Deliver Notes', and a 'Deliver To' button. A yellow arrow with the number '1' points to the 'Work Task' button.

Workflow Information		Folder ID: 5007436
Status: Assigned	Assigned To: Gulliver Perriweather	
Received Date: 12-13-2013	Office: Lowell	
Task Category: Case Maintenance	Notes:	
Disposition:	Disposition Date:	
Routing Notes:		

Assignment Summary			Task ID: 77087
Assigned To:	Assigned By:	Assigned Date:	
Gulliver Perriweather	Gulliver Perriweather	01-10-2014	
Gulliver Perriweather	Ezra Sykes	01-10-2014	
Ezra Sykes	Ezra Sykes	01-10-2014	
Susan Lazar	Susan Lazar	01-10-2014	

SNAP Change Report Form		Document ID: 0901ceee6017893a
Client Information:	Document Information:	
First Name: LASTV	Folder ID: 5007436	
Last Name: FIRSTV	Document Source: EDMC	
SSN: 060-07-7436	Document Size: 366 KB	
Date of Birth: 05-1990	Document Category: Case Maintenance	
	Document Type: SNAP Change Report Form	
	Document Processed?:	
	Document Notes:	

Select user by Office: **Holyoke** | Deliver To User: | Deliver Notes: | **Deliver To**

Change To New | **Work Task**

2. Review the document(s) by clicking on Document Tab (hyperlink with the document’s name).

The screenshot shows the 'SNAP Change Report Form(1)' tab selected. The interface is similar to the previous screenshot, but the 'Workflow Information' section now shows 'Status: In Process'. A yellow arrow with the number '2' points to the 'SNAP Change Report Form(1)' tab at the top left.

Workflow Information		Assigned To: Gulliver Perriweather
Status: In Process	Office: Lowell	
Received Date: 12-13-2013	Notes:	
Task Category: Case Maintenance	Disposition Date:	
Disposition:		
Routing Notes:		

Edit Task Information

Assignment Summary		
Assigned To:	Assigned By:	Assigned Date:
Gulliver Perriweather	Gulliver Perriweather	01-10-2014
Gulliver Perriweather	Ezra Sykes	01-10-2014
Ezra Sykes	Ezra Sykes	01-10-2014
Susan Lazar	Susan Lazar	01-10-2014

SNAP Change Report Form | Document ID: |

3. Click the “Disposition” drop-down at bottom of page, and select the appropriate disposition.
4. Click “Complete Task” button.

IMPORTANT: We will accept your application if it contains your name and address (if you have one) on page 1 and your signature on page 5. This minimal information will establish your application filing date. However, the remaining information on the form must be completed, and we must interview you to determine your eligibility. If you are eligible, your SNAP benefits will start as of the date we receive your application.

Please try to answer all the questions on the application. The more information we have, the more quickly we will be able to act on your application. If you aren't sure what a question means or how to answer it, leave it blank and we will talk about it during your interview. After we receive your application, we will contact you for an interview and ask you more questions. This interview will take place either in the office where you returned your application or over the telephone. If you need an interpreter to help you complete this form or for the interview, tell us and we will arrange for one. Below we list the types of things you will need to provide for your application. Please look at the list and gather the proofs you will need.

YOU MAY GET SNAP BENEFITS WITHIN SEVEN DAYS IF:

- Your income and monthly bank add up to less than your monthly housing expenses; or

Document Notes: Save

Disposition: **Processed** Notes: Save Notes Complete Task

Select user by Office: **Processed** Deliver To: User: Deliver Notes:

Change To New

Duplicate - No Action Taken
 Forwarded to Another Agency
 Returned to Client
 Unidentified
 Unreadable Image

Logout DTA myWork

5. The **Task Summary** page will be displayed, showing the document as “Processed” and the “Document Processed?” field will have a checkmark.
6. Click on the “Next Task” button to move to your next assigned task!

myWorkflows Search Tasks Profile Edit

Task Summary

Workflow Information Folder ID: 5007436

Status: **Processed** Assigned To: Gulliver Perriweather
 Received Date: 12-13-2013 Office: Lowell
 Task Category: Case Maintenance Notes:
 Disposition: Processed Disposition Date: 01-10-2014
 Routing Notes:

Assignment Summary Task ID: 77087

Assigned To:	Assigned By:	Assigned Date:
Gulliver Perriweather	Gulliver Perriweather	01-10-2014
Gulliver Perriweather	Ezra Sykes	01-10-2014
Ezra Sykes	Ezra Sykes	01-10-2014
Susan Lazar	Susan Lazar	01-10-2014

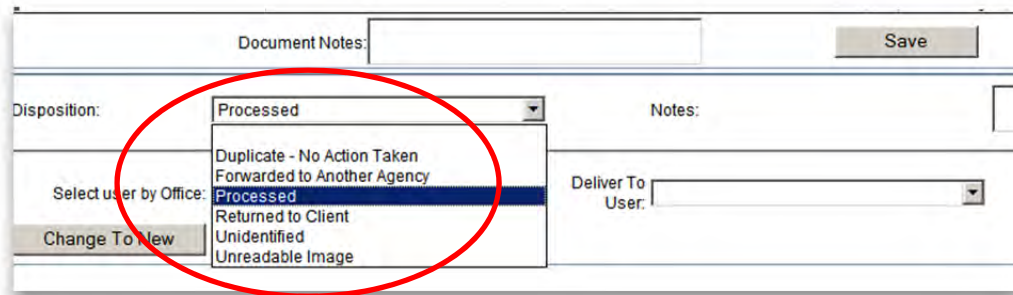
SNAP Change Report Form Document ID: 0901ceee8017693a

Client Information:	Document Information:
First Name: LASTV	Folder ID: 5007436
Last Name: FIRSV	Document Source: EDMC
SSN: 060-07-7436	Document Size: 366 KB
Date of Birth: 05-05-1990	Document Category: Case Maintenance
AP ID: 5007436	Document Type: SNAP Change Report Form
	Document Processed? <input checked="" type="checkbox"/>
	Document


Change To New Next Task

Users may select from the following Disposition Codes from the Task Summary tab:

- **Duplicate – No Action Taken** – This document was a duplicate of a document that was already processed.
- **Forwarded to Another Agency** – This document was designated for another agency and has been delivered to that agency by TAO staff.
- **Processed** – This document was processed and completed successfully by the user.
- **Returned to Client** – This document was returned to the client, usually because of missing information.
- **Unreadable Image** – This document could not be used due to legibility (not caused by poor scanning).
- **Unidentified** – This document could not be associated with a client or purpose.



The screenshot shows a software interface for document management. At the top, there is a 'Document Notes' field with a 'Save' button. Below this, there is a 'Disposition:' dropdown menu currently set to 'Processed'. A red circle highlights this dropdown menu, which is open to show a list of options: 'Processed', 'Duplicate - No Action Taken', 'Forwarded to Another Agency', 'Returned to Client', 'Unidentified', and 'Unreadable Image'. The 'Processed' option is highlighted in blue. To the right of the dropdown is a 'Notes:' field. Below the dropdown is a 'Select user by Office:' field with a 'Change To New' button. To the right of this is a 'Deliver To User:' dropdown menu.

 **Note:** In most cases, you will select the disposition type of “Processed”. By completing a task, a user is indicating that all relevant information has been processed or acted upon (e.g. returned document to client, forwarded to another agency).

Completing a Task Containing Multiple Documents

There may be times when a task contains more than one document. Before disposing of the entire task, you must “Process” each document. This safeguard ensures that the user has reviewed all documents prior to disposing of the task.

1. From the Task Summary page, click the “Work Task” button.

The screenshot displays a task summary page with four main sections: Workflow Information, Assignment Summary, SNAP Benefits Application, and Verifications VC-1. At the bottom, there is a control bar with a dropdown menu for 'Select user by Office' (set to 'Holyoke'), a 'Deliver To User' field, a 'Deliver Notes' field, and three buttons: 'Deliver To New', 'Work Task', and 'Separate Documents'. A yellow arrow with the number '1' points to the 'Work Task' button.

Workflow Information		Folder ID: 4004194
Status: Assigned	Assigned To: Gulliver Perriweather	
Received Date: 12-13-2013	Office: Holyoke	
Task Category: SNAP Application	Notes:	
Disposition:	Disposition Date:	
Routing Notes:		

Assignment Summary			Task ID: 75999
Assigned To:	Assigned By:	Assigned Date:	
Gulliver Perriweather	Gulliver Perriweather	01-10-2014	
Gulliver Perriweather	Gulliver Perriweather	01-10-2014	
Gulliver Perriweather	Gulliver Perriweather	01-10-2014	

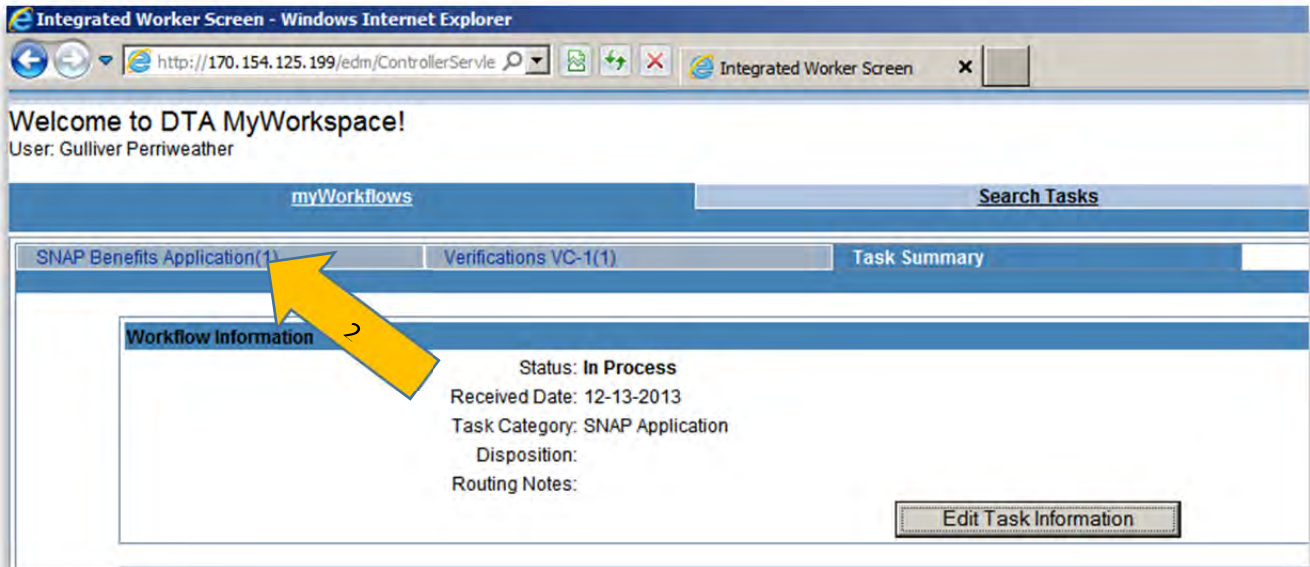
SNAP Benefits Application		Document ID: 0901cbee80170d43
Client Information:	Document Information:	
First Name: Johnny	Folder ID: 4004194	
Last Name: Smith	Document Source: EDMC	
SSN: 060-07-4194	Document Size: 1215 KB	
Date of Birth: 05-05-1990	Document Category: SNAP Application	
AP ID: 4004194	Document Type: SNAP Benefits Application	
	Document Processed?:	
	Document Notes:	

Verifications VC-1		Document ID: 0901cbee80178521
Client Information:	Document Information:	
First Name: Johnny	Folder ID: 4004194	
Last Name: Smith	Document Source: EDMC	
SSN: 060-07-4194	Document Size: 1215 KB	
Date of Birth: 05-05-1990	Document Category: Verification	
AP ID: 4004194	Document Type: Verifications VC-1	
	Document Processed?:	
	Document Notes:	

Select user by Office: **Holyoke** | Deliver To User: | Deliver Notes: | Deliver To

Work Task | Separate Documents

2. Review the first document by clicking on its name in the Document Tab (hyperlink with the document's name).



3. Once you are finished reviewing the document, at the bottom of the page, check the "Processed?" checkbox.
4. Click the "Save" button.

The screenshot shows a form with several sections. At the bottom, there is a checkbox labeled "Processed?" which is checked, and a "Save" button. Two yellow arrows with numbers 3 and 4 point to these elements respectively. The form also includes fields for "First Name", "Middle Initial", and "Social Security Number". Other sections include "ur (check one)" with options for "Name at Birth", "Maiden Name", "Married Name", "Prior Marriage Name", and "Alias"; "Gender" with "M" and "F" options; "Are you pregnant?" with "yes" and "no" options; "(check one)" with options for "Married", "Never Married", "Divorced", "Separated", and "Widowed"; "Preferred language?"; "Race: This information is collected to make sure everyone is treated fairly. Your answer is voluntary, and it will not affect your benefit amount."; "Ethnicity: Hispanic or Latino" with "yes" and "no" options; and "Race: (check all applicable)". At the very bottom, there is a "Notes:" field with "Save Notes" and "Complete Task" buttons.

- Return to the **Task Summary** tab, where you are able to confirm which documents have been processed. Determine this by reviewing the “Document Processed?” field. There should be a check symbol showing the document has been processed.
- Review the next document by clicking on its name in the Document Tab (hyperlink with the document’s name).

The screenshot displays a software interface with several sections:

- Workflow Information:** Status: In Process, Received Date: 12-13-2013, Task Category: SNAP Application, Disposition: , Routing Notes: . Assigned To: Gulliver Perriweather, Office: Holyoke, Notes: , Disposition Date: . Folder ID: 4004194. Includes an "Edit Task Information" button.
- Assignment Summary:** Task ID: 75999. Table with columns: Assigned To, Assigned By, Assigned Date.

Assigned To	Assigned By	Assigned Date
Gulliver Perriweather	Gulliver Perriweather	01-10-2014
Gulliver Perriweather	Gulliver Perriweather	01-10-2014
Gulliver Perriweather	Gulliver Perriweather	01-10-2014
- SNAP Benefits Application:** Document ID: 0901cbee80175d43. Client Information: First Name: Johnny, Last Name: Smith, SSN: 060-07-4194, Date of Birth: 05-05-1990, AP ID: 4004194. Document Information: Folder ID: 4004194, Document Source: EDMC, Document Size: 1215 KB, Document Category: SNAP Application, Document Type: SNAP Benefits Application, Document Processed?: , Document Notes: .
- Verifications VC-1:** Document ID: 0901cbee80176521. Client Information: First Name: Johnny, Last Name: Smith, SSN: 060-07-4194, Date of Birth: 05-05-1990, AP ID: 4004194. Document Information: Folder ID: 4004194, Document Source: EDMC, Document Size: 1215 KB, Document Category: Verification, Document Type: Verifications VC-1, Document Processed?: , Document Notes: .

7. At the bottom of the page, check the "Processed?" checkbox.
8. Click the "Save" button.

Marital Status	Pregnant? <input type="checkbox"/> yes <input type="checkbox"/> no
8. Is there a child(ren) under age 18 living with you who is not your child, and who is not under your supervision and control? If yes, who? _____	<input type="checkbox"/> yes <input type="checkbox"/> no
9. Is anyone living with you a roomer or boarder (person who pays for a room or room and meals)? If yes, what is this person's name? _____	<input type="checkbox"/> yes <input type="checkbox"/> no
10. Are foster care payments being made to your household for anyone living with you? <input type="checkbox"/> yes <input type="checkbox"/> no If yes, for whom are the payments being made? _____	
11. Are you or is anyone living with you a resident of a state other than Massachusetts or country other than the U.S. or are you or is anyone living with you intending to leave Massachusetts? If yes, who is not a resident or is intending to leave? _____	<input type="checkbox"/> yes <input type="checkbox"/> no
12. Are you or is anyone living with you NOT a U.S. citizen?	<input type="checkbox"/> yes <input type="checkbox"/> no
Document Notes: _____	<input checked="" type="checkbox"/> Processed? <input type="button" value="Save"/>
Notes: _____	<input type="button" value="Save Notes"/> <input type="button" value="Complete Task"/>

- Return to the **Task Summary** tab, where you are able to confirm that all documents have been processed. Determine this by reviewing the “Document Processed?” field for each document.

Workflow Information Folder ID: 4004194

Status: In Process
 Received Date: 12-13-2013
 Task Category: SNAP Application
 Disposition:
 Routing Notes:

Assigned To: Gulliver Perriweather
 Office: Holyoke
 Notes:
 Disposition Date:

Assignment Summary Task ID: 75999


Assigned To:	Assigned By:	Assigned Date:
Gulliver Perriweather	Gulliver Perriweather	01-10-2014
Gulliver Perriweather	Gulliver Perriweather	01-10-2014
Gulliver Perriweather	Gulliver Perriweather	01-10-2014

SNAP Benefits Application Document ID: 0901ceee80175d43

Client Information:	Document Information:
First Name: Johnny Last Name: Smith SSN: 060-07-4194 Date of Birth: 05-05-1990 AP ID: 4004194	Folder ID: 4004194 Document Source: EDMC Document Size: 1215 KB Document Category: SNAP Application Document Type: SNAP Benefits Application Document Processed?: <input checked="" type="checkbox"/> Document Notes:

Verifications VC-1 Document ID: 0901ceee80175d43

Client Information:	Document Information:
First Name: Johnny Last Name: Smith SSN: 060-07-4194 Date of Birth: 05-05-1990 AP ID: 4004194	Folder ID: 4004194 Document Source: EDMC Document Size: 1215 KB Document Category: Verification Document Type: Verifications VC-1 Document Processed?: <input checked="" type="checkbox"/> Document Notes:



Notes:

10. Click the "Disposition" drop-down, at bottom of page and select the appropriate disposition.
11. Click "Complete Task" button.

The screenshot displays two document record cards. The top card is for a 'SNAP Benefits Application' (Document ID: 0901ceee80175d43) with client information for Johnny Smith (SSN: 060-07-4194, AP ID: 4004194) and document details (Folder ID: 4004194, Size: 1215 KB). The bottom card is for 'Verifications VC-1' (Document ID: 0901ceee80176521) with the same client information and document details (Folder ID: 4004194, Size: 1215 KB). Below the cards, a 'Disposition' dropdown menu is open, showing options: 'Processed', 'Duplicate - No Action Taken', 'Forwarded to Another Agency', 'Returned to Client', 'Unidentified', and 'Unreadable Image'. The 'Processed' option is selected. To the right of the dropdown is a 'Notes' field. Further right are 'Save Notes' and 'Complete Task' buttons. A 'Deliver To' dropdown is also visible, currently showing 'User:'. A 'Deliver Notes' field is on the far right. A 'Logout DTA MyWorker' link is at the bottom right. Two yellow arrows point to the 'Disposition' dropdown (labeled '10') and the 'Complete Task' button (labeled '11').

12. The **Task Summary** page will be displayed, showing the document "Status" as "Processed."
13. Click on the "Next Task" button to move to your next assigned task!

Workflow Information Folder ID: 4004194

Status: **Processed**
 Received Date: 12-13-2013
 Task Category: SNAP Application
 Disposition: Processed
 Routing Notes:

Assigned To: Gulliver Perriweather
 Office: Holyoke
 Notes:
 Disposition Date: 01-10-2014

Assignment Summary Task ID: 75999

Assigned To:	Assigned By:	Assigned Date:
Gulliver Perriweather	Gulliver Perriweather	01-10-2014
Gulliver Perriweather	Gulliver Perriweather	01-10-2014
Gulliver Perriweather	Gulliver Perriweather	01-10-2014

SNAP Benefits Application Document ID: 0901ceee80175d43

Client Information:	Document Information:
First Name: Johnny Last Name: Smith SSN: 060-07-4194 Date of Birth: 05-05-1990 AP ID: 4004194	Folder ID: 4004194 Document Source: EDMC Document Size: 1215 KB Document Category: SNAP Application Document Type: SNAP Benefits Application Document Processed?: <input checked="" type="checkbox"/> Document Notes:

Verifications VC-1 Document ID: 0901ceee80176521

Client Information:	Document Information:
First Name: Johnny Last Name: Smith SSN: 060-07-4194 Date of Birth: 05-05-1990 AP ID: 4004194	Folder ID: 4004194 Document Source: EDMC Document Size: 1215 KB Document Category: Verification Document Type: Verifications VC-1 Document Processed?: <input checked="" type="checkbox"/> Document Notes:

ge To New Next Task

Searching for New Tasks

Searching for new tasks allows users to see documents that need to be assigned in their local office (or other local offices). To search for new tasks in an office, perform the following steps:

1. Click the **Search Tasks** tab.
2. In the “Status” dropdown, select “New.”

The screenshot shows the DTA MyWorkspace interface. At the top, there is a navigation bar with tabs for 'myWorkflows', 'Search Tasks', and 'Profile Edit'. A yellow arrow labeled '1' points to the 'Search Tasks' tab. Below the navigation bar is the 'Task Search' section, which contains various search criteria fields: Last Name, First Name, AP ID, SSN, Date of Birth, Folder ID, Task Category, Disposition, Status, Office, Assigned To, Date Received From, Date Received To, Disposed Date From, and Disposed Date To. A yellow arrow labeled '2' points to the 'Status' dropdown menu, which is currently open and shows options: Assigned, Hold, In Process, New, and Processed. At the bottom of the search section are 'Search Tasks' and 'Reset Search' buttons. The page footer includes 'Logout DTA MyWorkspace!'.

3. In the "Office" dropdown list, select the office for which you are searching.

The screenshot shows a web application window titled "Search Tasks". The form contains several input fields and dropdown menus:

- Search Tasks:** A blue button at the top left of the form.
- First Name:** A text input field.
- Date of Birth:** A date input field with MM/DD/YYYY format.
- Status:** A dropdown menu currently set to "New".
- Disposition:** A dropdown menu.
- Date Received To:** A date input field with MM/DD/YYYY format.
- Disposed Date To:** A date input field with MM/DD/YYYY format.
- Office:** A dropdown menu with a list of office names. The list is open, and a yellow arrow points to the "Holyoke" option. The list includes: Central Eligibility Unit, Central Office - Data Matching Unit, Central Office - General, Central Office - Hearings, Central Office - Quality Control, Central Office - Recoveries, Centralized TAFDC, Dudley Square, EOHHS - Chelsea Center, Fall River, Fitchburg, Framingham, Greenfield, Holyoke, Hyannis, Lawrence, Lowell, Malden, Malden Centralized SSI Office, New Bedford, Newmarket Square, North Shore, Pittsfield, Plymouth, Southbridge, Springfield Liberty, Springfield State, Taunton, Unidentified, and Worcester.
- Buttons:** "Search Tasks" and "Reset Search" buttons at the bottom of the form.
- Footer:** A link "Logout DTA MyWorkspace!" at the bottom right.

4. Click "Search Tasks" button.

The screenshot shows the 'Search Tasks' form with the following fields and annotations:

- Status:** A dropdown menu set to 'New', circled in red.
- Office:** A dropdown menu set to 'Holyoke', circled in red.
- Search Tasks:** A button highlighted with a yellow arrow pointing to it.
- Reset Search:** A button located next to the Search Tasks button.

Other fields include: First Name, AP ID, Date of Birth (MM/DD/YYYY), Disposition, Date Received To (MM/DD/YYYY), and Disposed Date To (MM/DD/YYYY). A 'Logout DTA MyWorkspace!' link is visible at the bottom right.

5. Review Task Results list.

The screenshot shows the 'Search Tasks' results page in a Windows Internet Explorer browser. The search criteria are: Status: New, Office: Holyoke. The results table is as follows:

Select All	Folder Id	Task Category	Release Date	Date Received	Office	AP ID	SSN	Last Name	First Name	DOB	Status	Assigned To	Envelope Info
<input type="checkbox"/>	4002158	Application SNAP		12/13/2013	Holyoke	4002158	060072158	LASTV	LASTV	5/5/1990	New		Envelope Notes
<input type="checkbox"/>	4002159	Application SNAP		12/13/2013	Holyoke	4002159	060072159	FIRSTV	LASTV	5/5/1990	New		Envelope Notes
<input type="checkbox"/>	5002168	Application SNAP		12/13/2013	Holyoke	5002168	060072168	FIRSTV	LASTV	5/5/1990	New		Envelope Notes
<input type="checkbox"/>	4002170	Application SNAP		12/13/2013	Holyoke	4002170	060072170	FIRSTV	LASTV	5/5/1990	New		Envelope Notes
<input type="checkbox"/>	5002175	Application SNAP		12/13/2013	Holyoke	5002175	060072175	FIRSTV	LASTV	5/5/1990	New		Envelope Notes
<input type="checkbox"/>	4002176	Application SNAP		12/13/2013	Holyoke	4002176	060072176	FIRSTV	LASTV	5/5/1990	New		Envelope Notes
<input type="checkbox"/>	4003129	Application SNAP		12/13/2013	Holyoke	4003129	060073129	FIRSTV	LASTV	5/5/1990	New		Envelope Notes

Page 1 of 1
Total Tasks found: 7

A yellow arrow with the number '5' points to the SSN column header.

The **Tasks Results** list includes detailed information about each task, including:

- Folder ID
- Task Category
- Release Date
- Date Received
- Office
- AP ID
- SSN
- Last Name
- First Name
- DOB
- Status
- Assigned To
- Envelope Info

Task Results may be sorted in ascending or descending order using the up and down arrows.

<input type="checkbox"/> Select All	Folder ID	Task Category	Release Date	Date Received	Office	AP ID	SSN	Last Name	First Name	DOB	Status	Assigned To	Envelope Info
<input type="checkbox"/>	5002175	Application SNAP		12/13/2013	Holyoke	5002175	060072175	FIRSTV	LASTV	5/5/1990	New		Envelope Notes
<input type="checkbox"/>	5002168	Application SNAP		12/13/2013	Holyoke	5002168	060072168	FIRSTV	LASTV	5/5/1990	New		Envelope Notes
<input type="checkbox"/>	4003129	Application SNAP		12/13/2013	Holyoke	4003129	060073129	FIRSTV	LASTV	5/5/1990	New		Envelope Notes
<input type="checkbox"/>	4002176	Application SNAP		12/13/2013	Holyoke	4002176	060072176	FIRSTV	LASTV	5/5/1990	New		Envelope Notes
<input type="checkbox"/>	4002170	Application SNAP		12/13/2013	Holyoke	4002170	060072170	FIRSTV	LASTV	5/5/1990	New		Envelope Notes
<input type="checkbox"/>	4002159	Application SNAP		12/13/2013	Holyoke	4002159	060072159	FIRSTV	LASTV	5/5/1990	New		Envelope Notes
<input type="checkbox"/>	4002158	Application SNAP		12/13/2013	Holyoke	4002158	060072158	FIRSTV	LASTV	5/5/1990	New		Envelope Notes

Page 1 of 1
Total Tasks found: 7



Note: The more search elements you choose, the fewer results you will obtain. Adding more search criteria *narrows* the search.

Assigning a Task to Another User

New tasks must be assigned in order to be processed. Assigning tasks can happen in multiple areas of MWS.

To assign a task to another user from the **Task Results** list, complete the following steps:

1. Check the task that you want to assign by clicking in the checkbox.
2. Select the office of the user to whom you want to assign the task by using the “Select user by Office” dropdown list.
3. Select the user to whom you want to assign the task by using the “Deliver to User” dropdown.
4. Click the “Deliver” button.

The screenshot shows the 'Task Results' page with a table of tasks. A yellow arrow labeled '1' points to the checkbox of the second task (AP_ID 5002168). Another yellow arrow labeled '2' points to the 'Select user by Office' dropdown menu, which is currently set to 'Holyoke'. A third yellow arrow labeled '3' points to the 'Deliver to User' dropdown menu, which is currently set to 'Perrweather, Gulliver (Holyoke)'. A fourth yellow arrow labeled '4' points to the 'Deliver' button. The table below shows the task details.

<input type="checkbox"/> Select All	Task Category	Release Date	Date Received	Office	AP_ID	SSN	Last Name	First Name	DOB	Status
<input type="checkbox"/>	SNAP		12/13/2013	Holyoke	5002175	060072175	FIRSTV	LASTV	5/5/1990	New
<input checked="" type="checkbox"/>	Application		12/13/2013	Holyoke	5002168	060072168	FIRSTV	LASTV	5/5/1990	New
<input type="checkbox"/>	SNAP		12/13/2013	Holyoke	4003129	060073129	FIRSTV	LASTV	5/5/1990	New
<input type="checkbox"/>	Application		12/13/2013	Holyoke	4002176	060072176	FIRSTV	LASTV	5/5/1990	New
<input type="checkbox"/>	SNAP		12/13/2013	Holyoke	4002170	060072170	FIRSTV	LASTV	5/5/1990	New
<input type="checkbox"/>	Application		12/13/2013	Holyoke	4002159	060072159	FIRSTV	LASTV	5/5/1990	New
<input type="checkbox"/>	SNAP		12/13/2013	Holyoke	4002158	060072158	FIRSTV	LASTV	5/5/1990	New

Page 1 of 1
Total Tasks found: 7

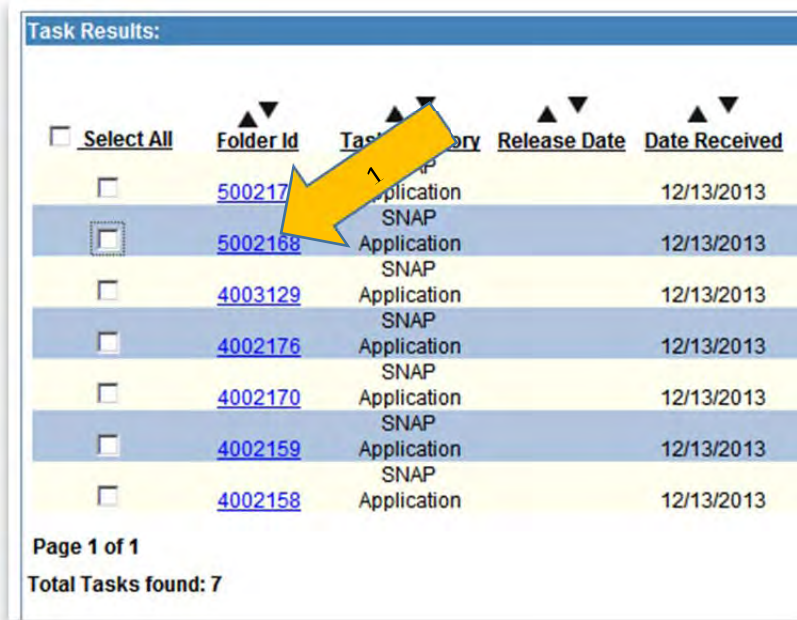
Select user by Office:

Deliver to User:

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To assign a task to another user from the **Task Summary** page or **Document** page, complete the following steps:

1. On the Task Results list, click the "Folder ID" hyperlink of the document you want to review and assign. This will bring you to the **Task Summary** tab



The screenshot shows a table titled "Task Results:" with the following columns: "Select All", "Folder Id", "Task Summary", "Release Date", and "Date Received". There are seven rows of data, each representing a task. A yellow arrow points to the "Folder Id" column header. The "Date Received" for all tasks is 12/13/2013.

<input type="checkbox"/> <u>Select All</u>	<u>Folder Id</u>	<u>Task Summary</u>	<u>Release Date</u>	<u>Date Received</u>
<input type="checkbox"/>	500217	Application SNAP		12/13/2013
<input checked="" type="checkbox"/>	5002168	Application SNAP		12/13/2013
<input type="checkbox"/>	4003129	Application SNAP		12/13/2013
<input type="checkbox"/>	4002176	Application SNAP		12/13/2013
<input type="checkbox"/>	4002170	Application SNAP		12/13/2013
<input type="checkbox"/>	4002159	Application SNAP		12/13/2013
<input type="checkbox"/>	4002158	Application		12/13/2013

Page 1 of 1
Total Tasks found: 7

- At the bottom of the page, select the office of the user to whom you want to assign the task by using the “Select user by Office” dropdown list.

Assignment Summary Task ID: 74202

Assigned To:	Assigned By:	Assigned Date:
Central Eligibility Unit	Erna Nunes	01-10-2014
Central Office - Data Matching Unit	Sharon Faria	01-10-2014
Central Office - General	Sandra Thompson	01-09-2014
Central Office - Hearings	PCG Business Administrator	01-03-2014
Central Office - Quality Control	PCG Business Administrator	12-17-2013
Centralized TAFDC		

SNAP Benefits Application Document ID: 0901ceee801758d3

Document Information:
 Folder ID: 5002175
 Document Source: EDMC
 Document Size: 1215 KB
 Document Category: SNAP Application
 Document Type: SNAP Benefits Application
 Document Processed?:
 Document Notes:

Verification of Caring for the Disabled Document ID: 0901ceee8017610c

Document Information:
 Folder ID: 5002175
 Document Source: EDMC
 Document Size: 1215 KB
 Document Category: Verification
 Document Type: Verification of Caring for the Disabled
 Document Processed?:
 Document Notes:

Select user by Office: Holyoke

Deliver To User: Deliver Notes:

- Select the user to whom you want to assign the task by using the “Deliver to User” dropdown.

Assignment Summary Task ID: 74202

Assigned To:	Assigned By:	Assigned Date:
Sharon Faria	Erna Nunes	01-10-2014
Sharon Faria	Sharon Faria	01-10-2014
Sandra Thompson	Sandra Thompson	01-09-2014
Christopher Fahibeck	PCG Business Administrator	01-03-2014
Sharon Barker	PCG Business Administrator	12-17-2013

SNAP Benefits Application Document ID: 0901ceee801758d3

Client Information:
 First Name: LASTV
 Last Name: FIRSTV
 SSN: 060-07-2175
 Date of Birth: 05-05-1990
 AP ID: 5002175

Document Information:
 Folder ID: 5002175
 Document Source: EDMC
 Document Size: 1215 KB
 Document Category: SNAP Application
 Document Type: SNAP Benefits Application
 Document Processed?:
 Document Notes:

Verification of Caring for the Disabled Document ID: 0901ceee8017610c

Client Information:
 First Name: LASTV
 Last Name: FIRSTV
 SSN: 060-07-2175
 Date of Birth: 05-05-1990
 AP ID: 5002175

Select user by Office: Holyoke

Deliver To User: Perrweather, Gulliver

Deliver Notes:

4. Add "Deliver Notes" if desired.
5. Click the "Deliver To" button.

AP Benefits Application Document ID: 0901ceee8017610c3

Client Information: First Name: LASTV Last Name: FIRSTV SSN: 060-07-2175 Date of Birth: 05-05-1990 AP ID: 5002175	Document Information: Folder ID: 5002175 Document Source: EDMC Document Size: 1215 KB Document Category: SNAP Application Document Type: SNAP Benefits Application Document Processed?: Document Notes:
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Verification of Caring for the Disabled Document ID: 0901ceee8017610c

Client Information: First Name: LASTV Last Name: FIRSTV SSN: 060-07-2175 Date of Birth: 05-05-1990 AP ID: 5002175	Document Information: Folder ID: 5002175 Document Source: EDMC Document Size: 1215 KB Document Category: Verification of Caring for the Disabled Document Type: Verification of Caring for the Disabled Document Processed?: Document Notes:
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Select user by Office: Deliver To User: Deliver Notes:

After a task has been assigned from the Task Summary page or Document page, the Task Summary page will appear, displaying the new assignment. To view notes, click the "View Routing Notes" hyperlink. A new tab or pop-up window with the notes will appear.

Workflow Information Folder ID: 5002175

Status: Assigned Received Date: 01-10-2014 Task Category: SNAP Application Disposition: Routing Notes: View Routing Notes	Assigned To: Gulliver Perrinweather Office: Holyoke Notes: Disposition Date:
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Executive Office of Health and Human Services Mass.gov

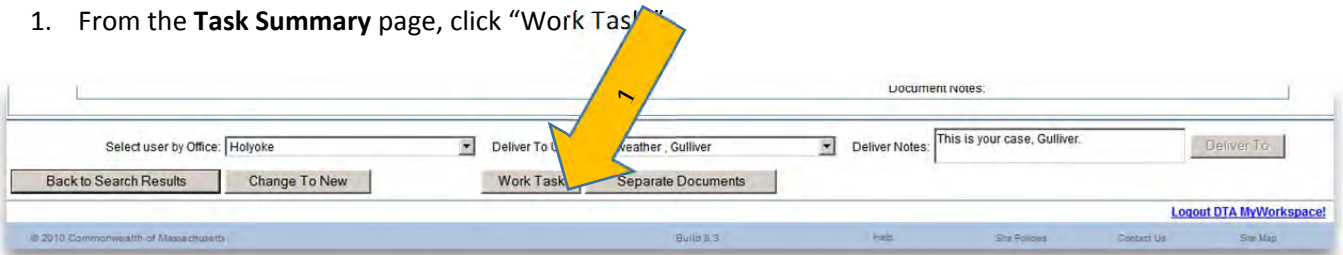
Routing Notes

AIMS_ID	Notes	Created Date
welckb	This is your case, Gulliver.	2014-01-10 17:23:22.0

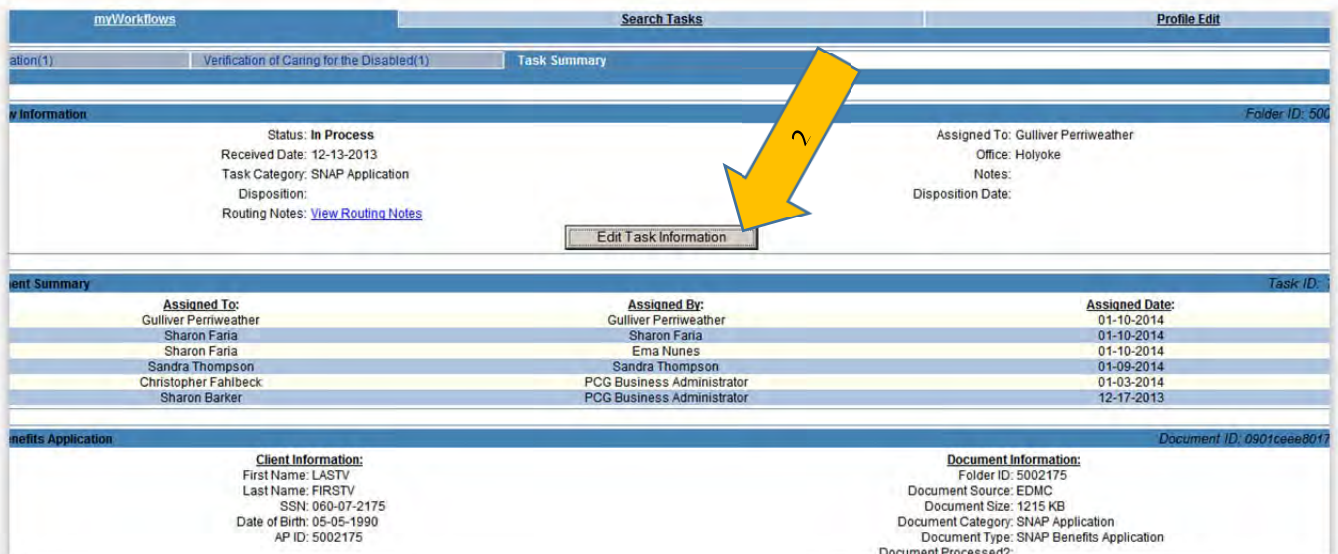
Routing Tasks to Another Office

Users can update task information to route tasks to different offices. To update office information in a task that has been assigned to you:

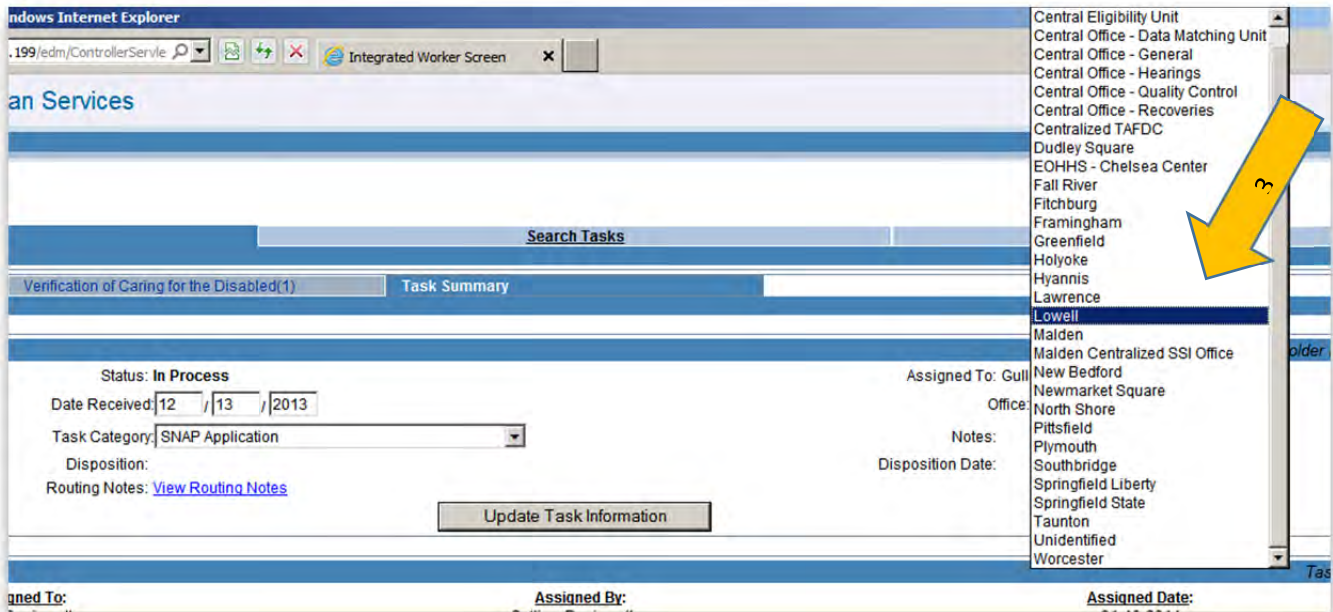
1. From the **Task Summary** page, click “Work Task”



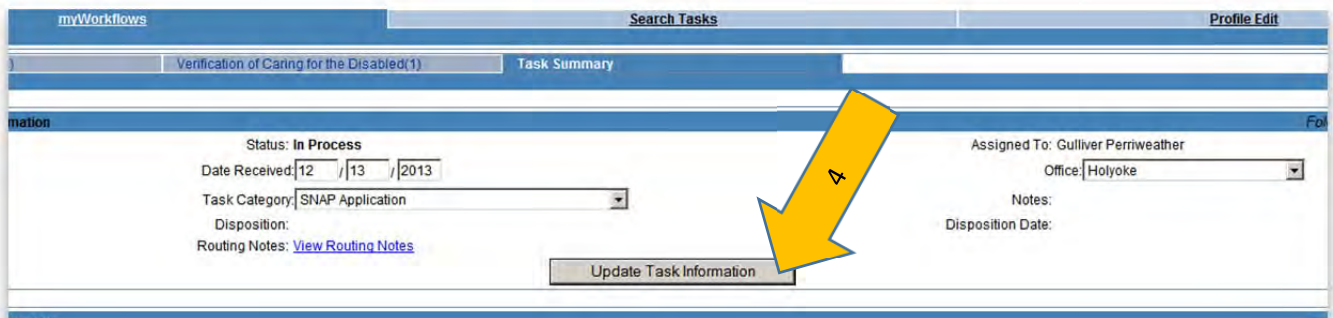
2. Click the “Edit Task Information” button



3. Select an office from the "Office" dropdown list.



4. Click "Update Task Information".



5. The new office location will be displayed after “Office”.

The screenshot shows a 'Workflow Information' panel with the following details: Status: In Process, Received Date: 12-13-2013, Task Category: SNAP Application, Disposition, and Routing Notes. On the right side, the 'Assigned To: Gunter, Berni' is listed, and the 'Office: Lowell' field is circled in red. A yellow callout box with the number '5' points to the circled office name. Other fields include 'Notes:', 'Disposition Date:', and 'Folder ID: 5002243'. An 'Edit Task Information' button is located at the bottom center.

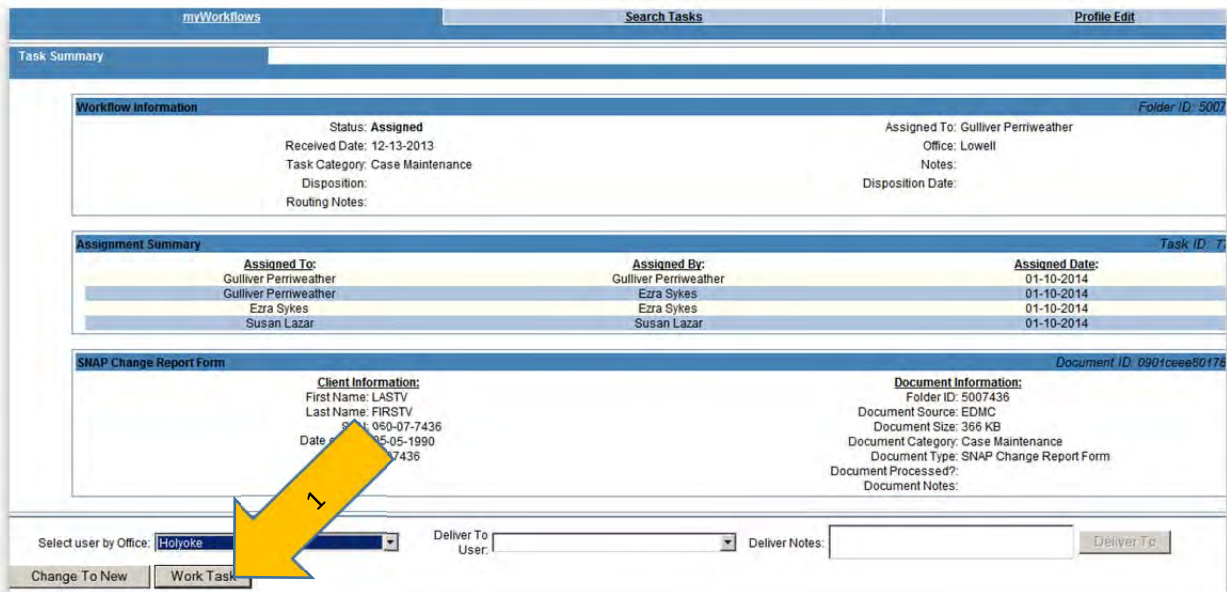
Once the user has updated the office, he or she can use the “Change to New” button. This will 1) un-assign the task, and 2) change the task status to “New.” ***This should be used when a user wants to route a task to another office, but doesn’t know the specific user to whom the task should be assigned.***

The screenshot shows a form with a 'Disposition:' dropdown menu. Below it is a 'Select user by Office:' dropdown menu with 'Holyoke' selected. At the bottom, there are two buttons: 'Back to Search Results' and 'Change To New', with the latter being circled in red.

Editing Index Data on Documents

To edit index information associated with a document (because of a data entry error, for example) that has been assigned to you, perform the following tasks:

1. From the Task Summary page, click “Work Task”

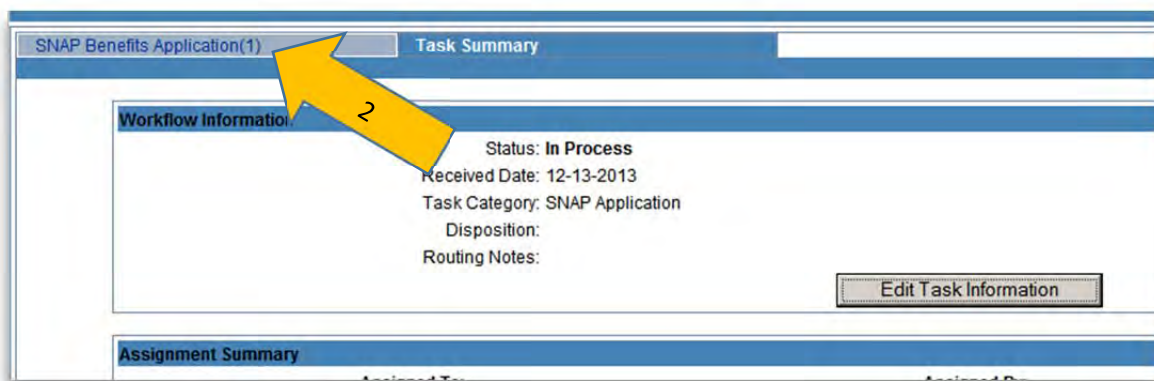


The screenshot shows the 'Task Summary' page with the following sections:

- Workflow Information:** Status: Assigned, Received Date: 12-13-2013, Task Category: Case Maintenance, Disposition, Routing Notes, Assigned To: Gulliver Perriweather, Office: Lowell, Notes, Disposition Date.
- Assignment Summary:** Assigned To: Gulliver Perriweather, Gulliver Perriweather, Ezra Sykes, Susan Lazar; Assigned By: Gulliver Perriweather, Ezra Sykes, Ezra Sykes, Susan Lazar; Assigned Date: 01-10-2014, 01-10-2014, 01-10-2014, 01-10-2014.
- SNAP Change Report Form:** Client Information: First Name: LASTV, Last Name: FIRSTV, SSN: 050-07-7436, Date of Birth: 05-05-1990, 7436; Document Information: Folder ID: 5007436, Document Source: EDMC, Document Size: 366 KB, Document Category: Case Maintenance, Document Type: SNAP Change Report Form, Document Processed?: , Document Notes: .

At the bottom, there is a 'Select user by Office' dropdown menu set to 'Holyoke', a 'Deliver To' dropdown menu, and a 'Deliver Notes' text box. Below these are buttons for 'Change To New' and 'Work Task'. A yellow arrow labeled '1' points to the 'Work Task' button.

2. Review the document by clicking on its name in the Document Tab (hyperlink with the document's name).



The screenshot shows the 'Task Summary' page with the 'SNAP Benefits Application(1)' document tab selected. The 'Workflow Information' section is visible, showing: Status: In Process, Received Date: 12-13-2013, Task Category: SNAP Application, Disposition, Routing Notes. An 'Edit Task Information' button is located at the bottom right of the 'Workflow Information' section. A yellow arrow labeled '2' points to the document name in the tab.

3. Click the “Edit Index” button near the top of the document.

myWorkflows Search Tasks Profile Edit

SNAP Benefits Application(1)

Client Information:
 First Name: John
 Last Name: Doe
 SSN: 060-07-2243
 Date of Birth: 05-05-1991
 AP ID: 5002243

Document Information:
 Folder ID: 5002243
 Document ID: 0901cdee801759ba
 Document Source: EDMC
 Document Size: 1215 KB
 Document Category: SNAP Application
 Document Type: SNAP Benefits Application

Edit Index

Massachusetts Department of Transitional Assistance
SNAP Benefits Application
 (formerly Food Stamps)

Source: (please check one)
 CEO Project Bread DMH
 DMR BMC Food Pantry
 MRC Other _____

Information About You (Answer all boxes.) If you are a noncitizen who chooses NOT to apply for SNAP benefits, you do not need to tell us your Social Security number or immigration status.

Last Name	First Name	Middle Initial	Social Security Number

4. Update the information in the fields that need to be corrected.
5. Click “Update Index”.

SNAP Benefits Application(1)

Client Information:
 First Name: John
 Last Name: Doe
 SSN: 060 - 07
 Date of Birth: 05 / 05 /
 AP ID: 5002243

Document Information:
 Folder ID: 5002243
 Document ID: 0901cdee801759ba
 Document Source: EDMC
 Document Size: 1215 KB
 Document Category: SNAP Application
 Document Type: SNAP Benefits Application

Update Index **Go Back**

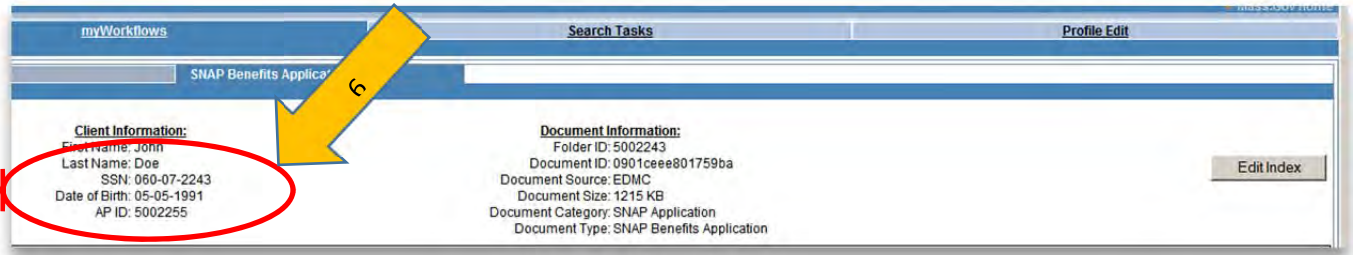
Massachusetts Department of Transitional Assistance
SNAP Benefits Application
 (formerly Food Stamps)

Source: (please check one)
 CEO Project Bread DMH
 DMR BMC Food Pantry
 MRC Other _____

Information About You (Answer all boxes.) If you are a noncitizen who chooses NOT to apply for SNAP benefits, you do not need to tell us your Social Security number or immigration status.

Last Name	First Name	Middle Initial	Social Security Number


6. The new indexing information will be displayed.



Self-assigning a Task

All tasks must be assigned before they can be processed. Users can assign tasks to themselves using the “Self-Assign Task” button.

1. From the **Task Results** list on the **Search Tasks** tab, click the “Folder ID” for the task that you want to self-assign.



The screenshot shows a table with 12 columns: Select All, Folder ID, Task Category, Release Date, Date Received, Office, AP ID, SSN, Last Name, First Name, DOB, and Status. A yellow arrow points to the Folder ID column. The table contains 8 rows of data, all with a status of 'New'.

<input type="checkbox"/> Select All	Folder ID	Task Category	Release Date	Date Received	Office	AP ID	SSN	Last Name	First Name	DOB	Status
<input type="checkbox"/>	4002158	Application		12/13/2013	Holyoke	4002158	060072158	FIRSTV	LASTV	5/5/1990	New
<input type="checkbox"/>	4002159	Application		12/13/2013	Holyoke	4002159	060072159	FIRSTV	LASTV	5/5/1990	New
<input type="checkbox"/>	5002168	Application		12/13/2013	Holyoke	5002168	060072168	FIRSTV	LASTV	5/5/1990	New
<input type="checkbox"/>	4002170	Application		12/13/2013	Holyoke	4002170	060072170	FIRSTV	LASTV	5/5/1990	New
<input type="checkbox"/>	5002175	Application		12/13/2013	Holyoke	5002175	060072175	FIRSTV	LASTV	5/5/1990	New
<input type="checkbox"/>	4002176	Application		12/13/2013	Holyoke	4002176	060072176	FIRSTV	LASTV	5/5/1990	New
<input type="checkbox"/>	5002031	Recertification		12/13/2013	Holyoke	5002031	061072031	Doe	Jane	5/5/1990	New
<input type="checkbox"/>	4003129	Application		12/13/2013	Holyoke	4003129	060073129	FIRSTV	LASTV	5/5/1990	New

Page 1 of 1
Total Tasks found: 8

2. From the **Task Summary** page, click “Self-Assign Task” button, located near the bottom of the page.

Verification of Caring for the Disabled Document ID: 0901ceee801760ed

Client Information: First Name: LASTV Last Name: FIRSTV SSN: 060-07-2159 Date of Birth: 05-05-1990 AP ID: 4002159	Document Information: Folder ID: 4002159 Document Source: EDMC Document Size: 1215 KB Document Category: Verification Document Type: Verification of Caring for the Disabled Document Processed?: Document Notes:
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Select user by Office: Deliver To: Deliver Notes:

[Logout DTA MyWorks](#)

3. The **Task Summary** page will display that the “Status” has changed from “New” to “Assigned.”

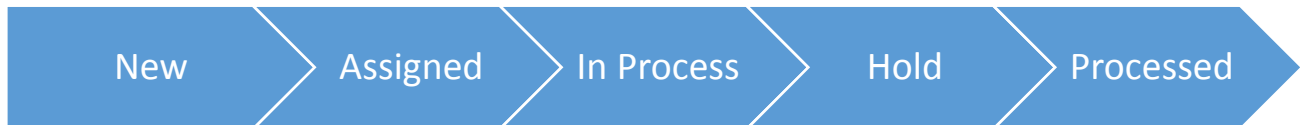
Workflow Information Folder ID: 4002159

Status: Assigned Received Date: 12-12-2013 Task Category: SNAP Application Disposition: Routing Notes:	Assigned To: Gulliver Perriweather Office: Holyoke Notes: Disposition Date:
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Understanding the Status of a Task

During processing, a task will move through the following statuses. It is important to understand these statuses in order to manage and prioritize work.

- **New** – This task has not yet been assigned.
- **Assigned** – This task has been assigned to a user.
- **In Process** – This task is *presently* being worked by a staff member. While “In Process,” other users may view but not take any action on this task.
- **Hold** – This task was in process, but the user logged off MWS before it was completed. Other users may view and re-assign the task when it is in the hold status.
- **Processed** – This task has been completed by a user.



A screenshot of a web application interface showing a dropdown menu for task status. The menu is open, displaying the following options: Assigned, Hold, In Process, New, and Processed. The 'Assigned' option is currently selected and highlighted in blue. To the left of the dropdown, the labels 'Status:', 'Disposition:', and 'Received To:' are visible, indicating the context of the dropdown.

Separating a Task with Multiple Documents

There may be instances in which it is necessary to separate documents within a task. This is necessary when an AP ID is mistyped, causing two documents (from different clients) to be linked within one task.

1. From the myWorkflow tab, identify a task with multiple documents based on the Document Type.

Folder ID	Task Category	Document Type	Release Date	Date Received	Office
3501211	SNAP Application	SNAP Benefits Application		1/15/2014	Holyoke
MWS-93667	SNAP Application	Verifications VC-1		1/15/2014	Holyoke
3501218	SNAP Application	SNAP Benefits Application		1/15/2014	Holyoke
MWS-93664	SNAP Application	Verifications VC-1		1/15/2014	Holyoke
3501214	SNAP Application	SNAP Benefits Application		1/15/2014	Holyoke

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2. Select the Folder ID of the task with multiple documents. This will open the Task Summary Page. This page shows detailed information about both documents within the task.

Task Summary

Workflow Information: Status Assigned, Received Date 01-15-2014, Task Category: SNAP Application, Disposition, Routing Notes. Assigned To: Shannon Montanez, Office: Holyoke, Notes, Disposition Date. Folder ID: 3501214

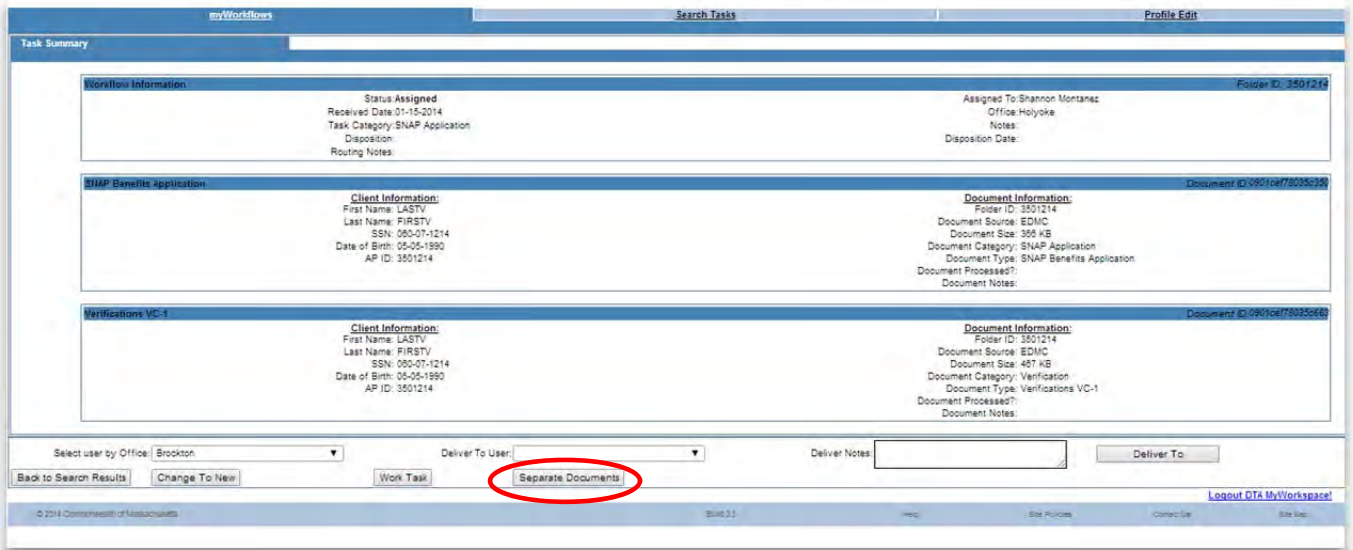
SNAP Benefits Application: Client Information: First Name: LASTV, Last Name: FIRSTV, SSN: 000-07-1214, Date of Birth: 05-05-1990, AP ID: 3501214. Document Information: Folder ID: 3501214, Document Source: EDMC, Document Size: 300 KB, Document Category: SNAP Application, Document Type: SNAP Benefits Application, Document Processed?: Document Notes. Document ID: 09010w75035639

Verifications VC-1: Client Information: First Name: LASTV, Last Name: FIRSTV, SSN: 000-07-1214, Date of Birth: 05-05-1990, AP ID: 3501214. Document Information: Folder ID: 3501214, Document Source: EDMC, Document Size: 407 KB, Document Category: Verification, Document Type: Verifications VC-1, Document Processed?: Document Notes. Document ID: 09010w75035640

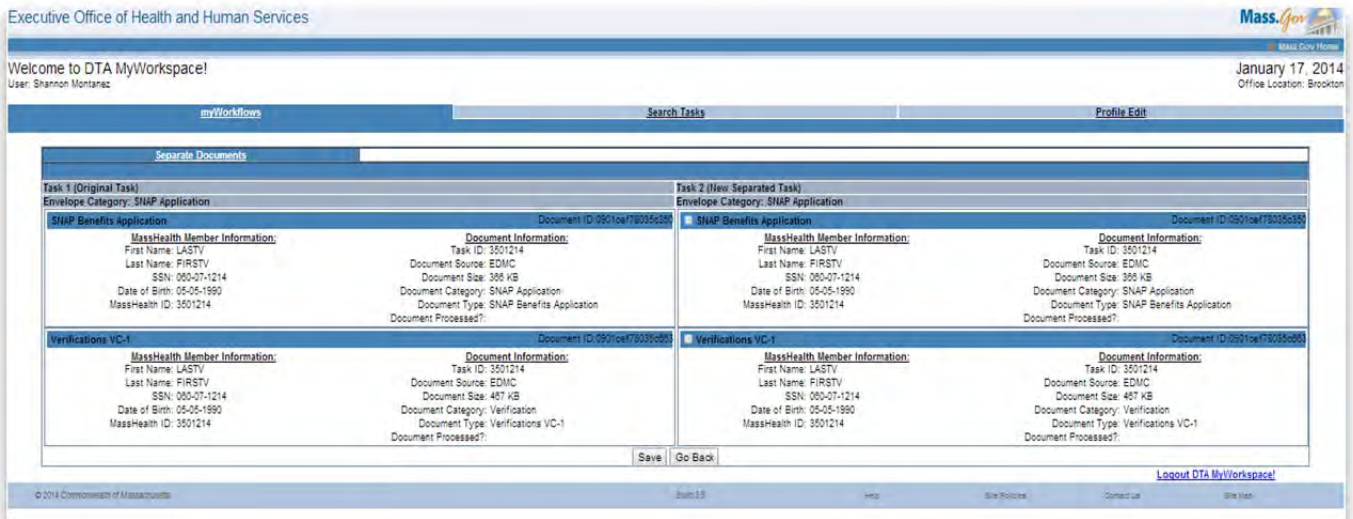
Select user by Office: Deliver To User: Deliver Notes:

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3. Select the button at the bottom center of the screen that reads "Separate Documents."



4. A new tab will open that says Separate Documents.



5. Check the box of the document you wish to separate.

Original Task	Task 2 (New Separated Task)
Envelope Category: SNAP Application	Envelope Category: SNAP Application
SNAP Benefits Application Document ID: 0901cae73035c350 MassHealth Member Information: First Name: LASTV Last Name: FIRSTV SSN: 050-07-1214 Date of Birth: 05-05-1990 MassHealth ID: 3501214 Document Information: Task ID: 3501214 Document Source: EDMC Document Size: 386 KB Document Category: SNAP Application Document Type: SNAP Benefits Application Document Processed?:	SNAP Benefits Application Document ID: 0901cae73035c350 MassHealth Member Information: First Name: LASTV Last Name: FIRSTV SSN: 050-07-1214 Date of Birth: 05-05-1990 MassHealth ID: 3501214 Document Information: Task ID: 3501214 Document Source: EDMC Document Size: 386 KB Document Category: SNAP Application Document Type: SNAP Benefits Application Document Processed?:
Verifications VC-1 Document ID: 0901cae73035c350 MassHealth Member Information: First Name: LASTV Last Name: FIRSTV SSN: 050-07-1214 Date of Birth: 05-05-1990 MassHealth ID: 3501214 Document Information: Task ID: 3501214 Document Source: EDMC Document Size: 467 KB Document Category: Verification Document Type: Verifications VC-1 Document Processed?:	<input checked="" type="checkbox"/> Verifications VC-1 Document ID: 0901cae73035c350 MassHealth Member Information: First Name: LASTV Last Name: FIRSTV SSN: 050-07-1214 Date of Birth: 05-05-1990 MassHealth ID: 3501214 Document Information: Task ID: 3501214 Document Source: EDMC Document Size: 467 KB Document Category: Verification Document Type: Verifications VC-1 Document Processed?:
<input type="button" value="Save"/> <input type="button" value="Go Back"/>	

6. Click Save.

Home to DTA MyWorkspace! January 17, 2014
Office Location: Brockton

myWorkflows Search Tasks Profile Edit

Separate Documents

Task 1 (Original Task)	Task 2 (New Separated Task)
Envelope Category: SNAP Application	Envelope Category: SNAP Application
SNAP Benefits Application Document ID: 0901cae73035c350 MassHealth Member Information: First Name: LASTV Last Name: FIRSTV SSN: 050-07-1214 Date of Birth: 05-05-1990 MassHealth ID: 3501214 Document Information: Task ID: 3501214 Document Source: EDMC Document Size: 386 KB Document Category: SNAP Application Document Type: SNAP Benefits Application Document Processed?:	SNAP Benefits Application Document ID: 0901cae73035c350 MassHealth Member Information: First Name: LASTV Last Name: FIRSTV SSN: 050-07-1214 Date of Birth: 05-05-1990 MassHealth ID: 3501214 Document Information: Task ID: 3501214 Document Source: EDMC Document Size: 386 KB Document Category: SNAP Application Document Type: SNAP Benefits Application Document Processed?:
Verifications VC-1 Document ID: 0901cae73035c350 MassHealth Member Information: First Name: LASTV Last Name: FIRSTV SSN: 050-07-1214 Date of Birth: 05-05-1990 MassHealth ID: 3501214 Document Information: Task ID: 3501214 Document Source: EDMC Document Size: 467 KB Document Category: Verification Document Type: Verifications VC-1 Document Processed?:	<input checked="" type="checkbox"/> Verifications VC-1 Document ID: 0901cae73035c350 MassHealth Member Information: First Name: LASTV Last Name: FIRSTV SSN: 050-07-1214 Date of Birth: 05-05-1990 MassHealth ID: 3501214 Document Information: Task ID: 3501214 Document Source: EDMC Document Size: 467 KB Document Category: Verification Document Type: Verifications VC-1 Document Processed?:
<input type="button" value="Save"/> <input type="button" value="Go Back"/>	

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The task has now separated. The original document's Task Summary should be displayed.

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Welcome to DTA MyWorkspace! January 17, 2014
Office Location: E

User: Shannon Montanez

myWorkflows Search Tasks Profile Edit

Task Summary

Workflow Information Folder ID: 3501214

Status: Assigned
 Received Date: 01-15-2014
 Task Category: SNAP Application
 Disposition:
 Routing Notes:

Assigned To: Shannon Montanez
 Office: Holyoke
 Notes:
 Disposition Date:

Assignment Summary Task ID: 93296

Assigned To: Shannon Montanez	Assigned By: Shannon Montanez	Assigned Date: 01-17-2014
-----------------------------------------	-----------------------------------------	-------------------------------------

SNAP Benefits Application Document ID: 090fce778035c359

Client Information: First Name: LASTV Last Name: FIRSTV SSN: 060-07-1214 Date of Birth: 05-05-1990 AP ID: 3501214	Document Information: Folder ID: 3501214 Document Source: EDMC Document Size: 366 KB Document Category: SNAP Application Document Type: SNAP Benefits Application Document Processed?: Document Notes:
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Select user by Office: Brookton Deliver To User: Deliver Notes: Deliver To

Change To New Work Task

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- When returning to the myWorkflows tab, the newly separated task will be visible, with the Folder ID beginning with MWS.

Executive Office of Health and Human Services

Welcome to DTA MyWorkspace!
User: Shannon Montanez

myWorkflows Search Tasks

myMetrics:
 myTasks (Assigned / In Process): 4
 myTasks (Hold): 0

myWorkflow: Active (4)

Folder ID	Task Category	Document Type	Release Date	Date Received	Office
3501214	SNAP Application	SNAP Benefits Application		1/15/2014	Holyoke
MWS-93587	SNAP Application	Verifications VC-1		1/15/2014	Holyoke
MWS-93584	SNAP Application	Verifications VC-1		1/15/2014	Holyoke
3501216	SNAP Application	SNAP Benefits Application		1/15/2014	Holyoke

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Logging Off

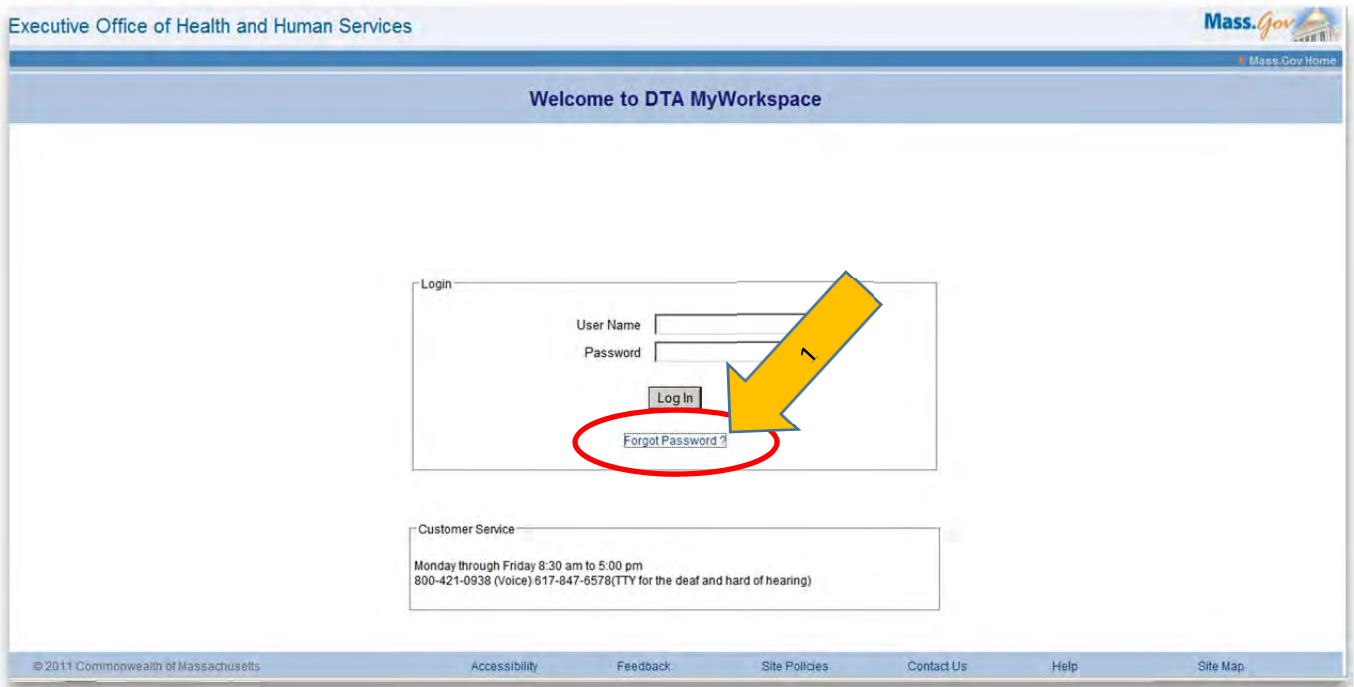
After completing a session in MWS, a user should logout by clicking on the “Logout DTA MyWorkspace!” button, which is found on all areas of MWS.

The screenshot displays the DTA MyWorkspace interface. At the top, it shows the Executive Office of Health and Human Services logo and the Mass.Gov logo. The user is logged in as Gulliver Pennweather, and the date is January 10, 2014. The interface includes a navigation bar with tabs for myWorkflows, Search Tasks, and Profile Edit. The main area is titled "Task Search:" and contains several search criteria fields: Last Name, First Name, AP ID, SSN, Date of Birth, Folder ID, Status, Office, Task Category, Disposition, Assigned To, Date Received From, Date Received To, Disposed Date From, and Disposed Date To. There are "Search Tasks" and "Reset Search" buttons at the bottom of the search area. A red circle highlights the "Logout DTA MyWorkspace!" link in the bottom right corner of the page.

Using “Forgot Password”

If users forget their password, the “Forgot Password?” function helps them establish a new password. To reset your password when you have forgotten it, complete the following steps:

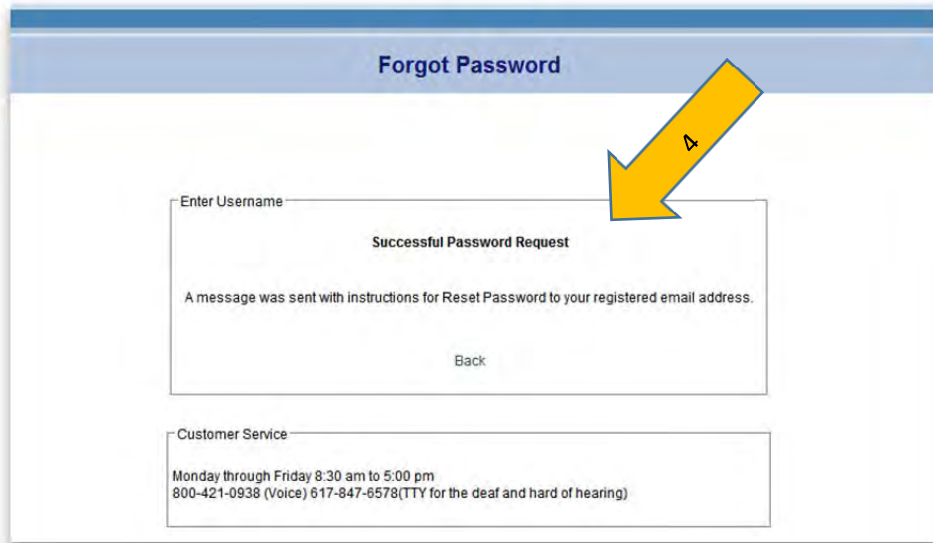
1. On the login page, click “Forgot Password?”



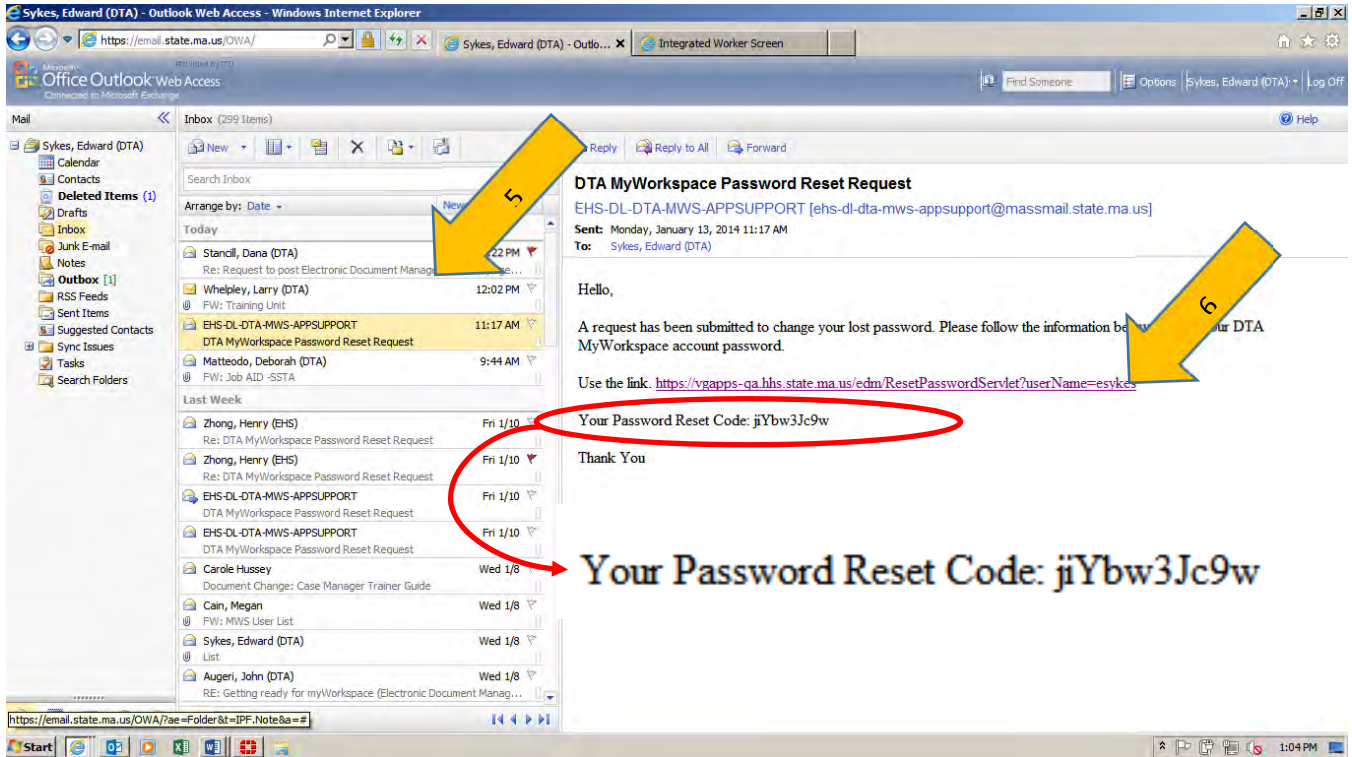
2. Enter your user name (welid).
3. Click "Submit."

The screenshot shows a web form titled "Forgot Password". At the top, there is a blue header with the text "Forgot Password". Below the header, there is a form area with a white background and a thin border. Inside this area, there is a section labeled "Enter Username" with a sub-label "Enter User Name" and a text input field containing the text "welekb". Below the input field is a "Submit" button. Two yellow arrows are overlaid on the form: one points to the input field with the number "2" inside it, and the other points to the "Submit" button with the number "3" inside it. Below the form area, there is a text box containing the message: "If you have forgotten your username, please call Customer Service." At the bottom of the page, there is a section labeled "Customer Service" with the following text: "Monday through Friday 8:30 am to 5:00 pm" and "800-421-0938 (Voice) 617-847-6578(TTY for the deaf and hard of hearing)".

4. Review confirmation.



5. Go to your email inbox, and look for email from administrator. Note your “Password Reset Code,” which you will use later in the process.
6. Click the provided hyperlink.



7. A new web page will be displayed. Enter the **Password Reset Code** displayed in the email you received.
8. Enter and re-enter your new password.
9. Click the “Reset” button.

The screenshot shows a web form titled "Reset Password" with a blue header. The form contains three input fields: "Code" with the value "jjYbw3Jc9w", "Password" with masked characters, and "Confirm Password" with masked characters. A "Reset" button is located below the input fields. Three yellow arrows with numbers 7, 8, and 9 point to the Code field, the Password and Confirm Password fields, and the Reset button, respectively. Below the form is a "Customer Service" section with contact information.

Reset Password

Code jjYbw3Jc9w

Password

Confirm Password

Reset

Customer Service

Monday through Friday 8:30 am to 5:00 pm
800-421-0938 (Voice) 617-847-6578(TTY for the deaf and hard of hearing)

You may now return to the login page, and log in with your new password!