



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

CHARLES D. BAKER
Governor


MARYLOU SUDDERS
Secretary

KARYN POLITO
Lieutenant Governor

MARY SHEEHAN
Acting Commissioner

Online Guide Transmittal 2022-37
May 12, 2022

To: Department of Transitional Assistance Staff

From:  Sarah Stuart, Associate Commissioner for Change Management

Re: Cross Program: Suspending the Use of the Electronic Document Management (EDM) Upload Tool

Overview

Effective immediately and until further notice, staff are to discontinue using the Electronic Document Management (EDM) Upload Tool to upload documents to an Electronic Case File (ECF). OLG 2022-19 Cross Program: Utilization of the Electronic Document Management (EDM) Upload Tool (Issued 3/18/2022) is now obsolete, and previous procedures for attaching certain documents to the ECF are to resume until further notice.

The EDM Upload tool remains available for use for **Third Party Verification Requests and Applications for Payment of Funeral only**. Systems changes to address identified pain points with the tool are in development. Until they are resolved this tool is not to be used for any other case work.

The issues reported are noted below for your reference.

- Documents uploaded with this tool populate to the client's Scanned Document History folder as an Available document, requiring follow up to disposition the document.
- Delays in the documents becoming Available for disposition.
- Clients are receiving automated text and email messages indicating they have submitted verifications when the documents are uploaded causing confusion for clients.

Purpose

The purpose of this transmittal is to advise staff that they are to immediately stop the use of this tool for applications, reevaluations, and case maintenance activities. The corresponding Online Guide page has been obsoleted to reflect this change.

**Staff
Responsibilities**

Staff must immediately stop using the EDM Upload Tool for application, reevaluations, and case maintenance activities. Previous procedures for attaching certain documents to the narrative are to resume until further notice. The EDM Upload tool remains available for use for Third Party Verification Requests and Applications for Payment of Funeral only.

**Obsoleted
Online Guide
Page**

Book: Business Process (BP)
Chapter: Procedures
Subchapter: Document Handling
Page: Guidelines for Using EDM Document Upload Tool

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.
