



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

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**Online Guide Transmittal 2020-28A
March 28, 2020**

To: Department of Transitional Assistance Staff
From:  Sarah Stuart, Associate Commissioner for Change Management
Re: Cross Program: Initiate an Online Application

Overview

In response to the recent state of emergency, the Department is temporarily allowing individuals to begin an application for TAFDC and EAEDC online. Effective March 24, 2020, individuals can initiate an application for TAFDC and EAEDC online by going to www.mass.gov/DTAConnect.

Purpose

The purpose of this Online Guide Transmittal is to advise staff of new procedural changes to allow applicants to initiate an application online for EAEDC and TAFDC. These changes include:

- procedural changes;
 - BEACON views;
 - TAO manager role;
 - case manager role; and
 - forms that require a signature.
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**Procedural
Changes**

Individuals can initiate an application for TAFDC and EAEDC benefits by phone or online at www.dtaconnect.com. When an individual applies online, they attest to providing truthful statements under penalty of perjury and are provided with the same notice of Rights and Responsibilities as applicants who apply through other means. Online applicants are subject to the same application processing requirements. The only difference between an online application and other methods of applications is that the signature is provided electronically. When a TAFDC or EAEDC application is initiated online, the applicant is given:

- the application number for tracking purposes;
- the option to download a PDF of the completed application;

TAFDC and EAEDC applications submitted online are visible in the TAFDC/EAEDC Web Applications View under Daily Priority Actions.

The view contains the following fields:

**BEACON
View**

- Grantee name
- SSN (last 4 digits if provided by the client)
- Program
- Received Date
- Web ID - reference number applicant receives from DTACConnect.com

Applications will populate in the TAFDC/EAEDC Web Applications View for the office the application is assigned to, based on the zip code used to apply. If no zip code was entered the application will be assigned to the Central Case Management Office (CCMO). The CCMO will transfer the case to the office covering the client's catchment area once it is established.

TAO Manager

A TAO manager or their designee must check this view throughout the day and assign any pending applications to a case manager to complete the application interview over the phone. No data will transfer from the web application onto BEACON. The case manager must enter all data into BEACON. Once the RFA Signature Page has been completed, the application data will be removed from the TAFDC/EAEDC Web Applications view as it is refreshed.

Case Manager

Case managers can view the Web Application data sheet from the TAFDC/EAEDC Web Applications View. This sheet contains the information the applicant entered online and must be printed out and scanned into the client's ECF.

Staff should use the information on the data sheet to search BEACON to see if there is already a pending application or active case.

The data sheet can be used to guide the conversation with the applicant, but all questions in the BEACON application workflow must be asked during the telephone interview. A client may apply for both programs, or for one program they are not eligible for. If during the course of the conversation it becomes clear that the client is ineligible for the program they initially completed the online request for, but may be eligible for another, the online request is to be honored.

Example 1: Luis Martinez completes an online request for TAFDC. The case manager completes a cold call and in speaking with Mr. Martinez determines that he is not eligible, as he has no dependent children in his home. Mr. Martinez is 66 years old and was recently let go from his job at a restaurant forced to close. He has no income and his only asset is \$150 in his bank account. The case manager explains that although not eligible for TAFDC, it sounds like he would be eligible for EAEDC as an elderly applicant and for SNAP. The RFA is completed for these two programs and the temporary emergency procedures due to COVID-19 are followed.

Example 2: Mary-Margaret O'Hearn completed an online request for EAEDC. In speaking with her it is determined that her hours have been reduced at work. She is not pregnant or disabled and she is not caring for any dependents. She is not eligible for TAFDC or EAEDC. But based on her gross income it sounds as though she will be eligible for SNAP. The RFA is completed for SNAP only and the temporary emergency procedures due to COVID-19 are followed.

The application date must be the received date from the view. Applications submitted to DTA after 5:00 p.m. on a business day, on a weekend or a holiday, must be assigned an application start date on BEACON of the next business day.

The case manager must **attempt a series of three cold calls to complete the interview**. If you are not able to reach the applicant, complete the RFA for the program requested, and schedule a telephone interview within 5 days. If you have a client without a working phone number, with an in-office ADA accommodation, or with HLS, please contact the Ombuds office.

Forms

Reminder: If a client has submitted an online request and has not provided an SSN it is important to conduct a client search prior to initiating the application. This can be done using other identifying information such as their name, date of birth or the phone number that they used to apply with. If unable to identify if the client is known to the system, the three cold calls must be attempted to ask the client if they have a SSN to use to apply. If not or the cold calls were not successful, the standard procedures for assigning a 99x number to hold in the SSN field must be used until a valid SSN can be updated and verified.

Web applications contain an electronic signature. A paper application is not to be sent to the client for signature when the application was initiated on the DTA Connect website. However, all other forms that require a signature, such as the *Absent Parent Information Form* and the *AP-SSI-IAR*, must be mailed out for a signature and included on the VC1. However, if the client has verbally agreed to cooperate and to sign and return the form(s), these verifications must be marked as verified and the case wrapped up if no other mandatory verifications are outstanding. A detailed narrative must be written and a reminder must be set to check the case in 60 days.

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.
