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

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**Operations Memo 2014-66
October 16, 2104**

To: Department of Transitional Assistance Staff

From: Anne O'Sullivan, Assistant Commissioner for Policy, Program and External Relations

Re: *AOS* TAFDC, EAEDC, and SNAP: Business Process Redesign (BPR) Overview

Overview

To achieve the goals of improved service delivery and outcomes for DTA clients, and improved program integrity and better overall operating efficiency, the Department has recently automated a number of functions in BEACON and introduced and implemented the Program Integrity (PI) Checklist. The Department has also moved to Electronic Document Management (EDM) to organize filing, expedite processing and allow case managers the ability to retrieve documents expeditiously. Continuing this effort, the way in which the Department conducts business will change dramatically effective October 27, 2014.

Taking into account national best practices documented by the United States Department of Agriculture, and positive outcomes reported by states that have implemented similar changes, the Department will move from a case ownership model to a First Available Worker (FAW) Model for SNAP-only eligibility determination and case maintenance. Rather than operating under an individual caseload model, all SNAP-only activities will be distributed on a statewide basis and received by SNAP case managers as specific actions.

These changes, including the implementation of a statewide Assistance Line, with enriched Interactive Voice Response (IVR) services, the integration of eLOG and Electronic Document Management (EDM) into BEACON, and supporting BEACON enhancements, will optimize staff time.

**Overview
(continued)**

These changes will also improve timeliness and accuracy for all DTA programs and enrich both client and case manager experiences.

It is important to note that the policies that govern eligibility for the programs administered by DTA have not changed. Rather, the changes implemented with this Business Process Redesign (BPR) are procedural and primarily effect the distribution of work.

**Purpose of
Memo**

The purpose of this Operations Memo is to advise staff of procedural changes that will be implemented as part of BPR and introduce:

- DTA's statewide Assistance Line with enhanced IVR capabilities;
 - the FAW Model for SNAP-only cases;
 - the dissolution of the Centralized SNAP/SSI Office;
 - changes to how cash and combination casework are managed;
 - changes to how in-office business is conducted;
 - the decommissioning of the eLOG and myWorkspace systems; and
 - BEACON enhancements.
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**Statewide
Assistance
Line**

Beginning October 27, 2014, individual SNAP case manager phone numbers will no longer be referenced on Department notices and communications. Notices will refer all clients (cash and SNAP) to the toll free phone number, **1-877-382-2363**, the Department's statewide Assistance Line.

Callers to this number will first be engaged by the enhanced IVR system which will afford them the ability to:

- check the status of an application and/or benefits (case status, benefit amount, next payment date, the date that DTA last received a document associated with their case);
 - update a mailing address and/or phone number;
 - request an Income Verification Letter;
 - obtain general information about Department programs;
 - request a SNAP application be mailed;
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**Statewide
Assistance
Line (continued)**

- connect with a Domestic Violence Specialist or other Department divisions (such as the Division of Hearings or Fraud Investigation and Data Match Unit) and EBT or Fraud Hotlines;
- be transferred to a TAO phone line; and
- be transferred to an assigned cash case manager's phone line (if applicable).

Clients will be able to obtain information and update some case data without case manager intervention. The assurance that they will be able to speak with a live person when calling the Department will result in fewer repeat calls and client visits to local offices. SNAP case managers will no longer have client voicemail messages to respond to. This will allow SNAP case managers more time to devote to casework activity, resulting in faster eligibility determination and benefit issuances for eligible clients. Whenever possible, DTA staff, at all levels, must advise clients about the benefits of using the Assistance Line.

To access case specific information or report changes using the IVR system, the identity of callers must be authenticated. The client will be prompted to provide his or her EBT card number, Social Security Number (or temporarily assigned identification number), year of birth, and mailing address zip code, which must exactly match BEACON records.

Callers may request to speak with the first available SNAP worker if they are calling to complete an interview, ask questions, report certain changes or conduct other business that cannot be completed via IVR. Non-client inquiries, third party calls, clients who attempt but fail to authenticate, and callers requesting assistance due to domestic violence or a disability will be directed to Recipient Services staff who will address the caller's needs or transfer the call to the appropriate staff.

Additionally, if a SNAP client calls the Assistance Line, has been authenticated, and needs to be interviewed for an application or recertification that is due within 45 days, the system will offer them the opportunity to speak with a SNAP case manager to conduct the interview even if this was not the reason for their call.

**Statewide
Assistance
Line (continued)**

IVR services will be offered to clients in five languages: English, Spanish, Portuguese, Cantonese, and Vietnamese. The IVR system will be available to clients seven days a week, 24 hours per day. Excepting holidays and other non-business days, the statewide Assistance Line will be staffed Monday through Friday from 8:15 AM to 4:45 PM.

Note: While the IVR menu prompts and messages will be available in five languages, the automated address and phone number update functionality will be available to English and Spanish speakers only. Clients whose primary language is not English or Spanish reporting such changes will be transferred to the next available SNAP case manager during business hours. Outside of business hours, these clients will hear a message in their chosen language instructing them to call back during normal business hours.

Direct Lines

SNAP case managers and supervisors will be assigned new direct line phone numbers for internal and personal use only. These new numbers will not be made public and **must** not be given to clients. Outgoing calls placed from DTA phones will not display the caller's number on the receiver's phone. All calls placed by SNAP-only case managers and supervisors as well as managers will display the Assistance Line phone number.

Active, pending, and recently closed cash clients will continue to have the ability to contact their assigned case manager via their direct line, but this phone number will no longer be advertised. Cash case managers may provide his or her phone number if they so choose but must advise clients of the benefits of the IVR system.

*Cash Case
Manager
Responsibility*

Important: When a cash case manager is out of the office for any reason, he or she must provide the name and phone number of their immediate supervisor (or backup supervisor) on their outgoing voicemail message.

All other staff, such as Domestic Violence Specialist and quality control (QC) staff, will continue to have a direct line at which they can be reached by clients.

*TAO
Switchboards*

TAO phone numbers will not be changing. All callers will be encouraged to call the Assistance Line, through which transfer to a TAO will be accessible. Switchboard operators will direct calls to the appropriate staff such as the assigned cash case managers, QC staff or to the statewide Assistance Line based on the caller's need. They will also complete simple requests and provide basic information (e.g. TAO location, SNAP application requests) as is current practice.

**SNAP: First
Available
Worker Model**

Effective October 27, 2014, SNAP case managers will no longer have assigned caseloads. All SNAP-only casework will be assigned on a statewide basis rather than by TAO catchment area. As there will be no case assignment in the SNAP program, multiple case managers, in multiple TAOs, may now play a role in a single eligibility determination. Clients will have a team of case managers assisting them rather than a single designated case manager.

The FAW model is comprised of three main categories of work known as *queues*. These include the Phone Queue, the Processing Queue, and the In-Person Queue. Casework activity will be divided into units of work, called 'Actions,' that will be generated through scanned documents, phone calls, system reminders, online applications, and in-office traffic. Case managers will be assigned Actions, based upon the queue to which they are assigned.

These Actions will be automatically prioritized based on document due dates and timely case processing standards before being assigned to case managers within each of the three queues. In special situations, a manager or supervisor can manually create and assign an Action to a case manager. The majority of the time, the SNAP case manager will request the next Action for processing through BEACON.

*SNAP Case
Manager Phone
Queue
Responsibilities*

SNAP case managers assigned to the Phone Queue will sign in to become part of the statewide Assistance Line through the Cisco Agent Desktop icon that will be installed on SNAP case managers', SNAP supervisors' and TAO managers' desktops. Based on their selection in the IVR system, callers will be routed to various call categories, including Interviews, Case Maintenance and Inquiry. Calls will be automatically distributed amongst SNAP case managers across the state who will answer client questions, address concerns, search BEACON for existing Actions associated with the case, create new Actions as needed, and make as much progress on all new and existing Actions as possible.

SNAP: First Available Worker Model (continued)

Callers who wish to speak with a Spanish, Portuguese, Cantonese or Vietnamese-speaking case manager will be routed to one if available. After a brief hold, if someone who speaks their language is not available, they will be given the option to speak with an English-speaking case manager. If the hold time is too lengthy, they will hear a message (in their chosen language) telling them that their call will be transferred to the next available English-speaking case manager with translation service assistance.

SNAP Case Manager Processing Queue Responsibilities

Case managers assigned to the statewide Processing Queue will request Actions from BEACON. Those assigned to this queue will complete Actions including initiating and processing recertifications, placing outgoing calls to conduct an initial “cold” call and scheduled application and recertification interviews, performing case maintenance activities scheduled as follow-up to previously completed Actions, addressing match data, and processing incoming verifications and other documents.

SNAP Case Manager In-Person Queue Responsibilities

Case managers assigned to the In-Person Queue will also request Actions using BEACON. These in-person Actions will be generated primarily at the Receptionist and Waiting Area Coordinator (WAC) level. As is the case today, those seeing clients at the Transitional Area Office (TAO) will continue to conduct a variety of application and case maintenance activities. Documents received in the TAO that are assigned an Urgent status will also be assigned to the TAO staff in the in-person queue for processing. All clients coming to a TAO must be informed as to how they could be served more quickly via the Assistance Line or by mailing or faxing their documents to the Electronic Document Management Center (EDMC).

A new role, the Integrated Transitional Assistance Office (iTAO) Director, has been created for BPR. This person will be assigned to Central Office and will:

- determine call staffing requirements based on historical data, trends, or anticipated increases; and
- determine how many statewide processing staff to assign based on processing backlogs and projections.

Each week, SNAP-only case managers will be assigned to one of the three queues, in shifts of no more than 3 hours at a time. On a typical day a SNAP case manager can expect to be assigned to two or all three queues at different times during the work day. Decisions about the queue to which a case manager will be assigned at any given time will be based on agency-wide processing need.

SNAP: First Available Worker Model (continued)

With a statewide team of case managers to serve them, increased automation, improved IVR and EDM services, and same-day response by phone, the goal of BPR is to enable and encourage clients to conduct the majority of business without traveling to and waiting at a TAO unnecessarily.

In addition to greater efficiency and immediate access to information, the FAW model will allow SNAP case managers the opportunity to provide additional referrals and more comprehensive case assistance to SNAP clients.

SNAP Case Manager Responsibilities

The FAW model requires that staff at all levels must adhere to the following:

- **Same Day Processing** – Any time that a case manager has the opportunity to complete an eligibility determination, that is, approve, deny, or recalculate benefits, they must do so. The goal is to complete applications and recertifications on the same day they are received whenever possible, and educate clients about how they can help make that happen.
 - **Taking the Case as Far as You Can** – While case managers will strive to wrap up a case whenever possible, those who are unable to do so are expected to make as much progress as possible and ensure that their work and their documentation will help the next case manager pick up where they left off.
 - **Making the Case Whole** – To reduce unnecessary client contact and ensure accuracy, case managers who are assigned an Action must complete all pending Actions associated with the case before exiting it.
 - **First Contact Resolution** – Every time that a case manager speaks with a client, the goal is to fully resolve their issue if any. To prevent unnecessary calls in the future, a case manager must make sure that there is nothing else that can be addressed while they have the client in front of them or on the phone.
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SNAP: First Available Worker Model (continued)

- **Creating Follow-Up Actions** – In some instances, case managers will schedule future Actions to make sure that the Department follows up with anticipated changes to a case (e.g. terminated income and checking the result of a scheduled SVES request). Much of the time, follow-up Actions will be received by another case manager, therefore the purpose for the follow-up must always be clearly narrated.
 - **Case Accuracy and Error Prevention** – To ensure accuracy, yet maintain an efficient system for case processing, case managers must always review financial and nonfinancial eligibility and the most recently completed recertification/reevaluation.
 - **Mandatory/Standardized Narratives** – Case managers must include a narrative for every Action that they perform. It is imperative that the next case manager who works on the case understands the case history with minimal effort.
 - **Case Updates and Customer Service** – In an effort to keep case information current and accurate, and in the interest of providing excellent customer service, as a standard practice at all contacts, case managers will:
 - ✓ confirm the client’s contact information (phone, address, and email address) and update as necessary; and
 - ✓ ask whether there are any additional questions/concerns that they can help the client with when completing the phone call or in-person meeting.
 - **Building Trust** – Case managers must make every effort to help clients understand the status of their case and DTA’s process at all times. Professionalism, courtesy, consistency and, most importantly, expedient results will help increase confidence in DTA and its processes.
 - **Working as a Team** – Staff will need to rely on one another for knowledge, support and feedback. Each case manager’s contribution(s) during every step of a process affects the entire outcome.
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SNAP: First Available Worker Model (continued)

- **Standardization** – Working as a team requires consistency in all aspects of the eligibility process, from verifying eligibility information to responding to questions from clients. Established policy and procedures must be applied consistently to ensure accuracy and to make the Department’s processes seamless and treat clients fairly.
 - **No Wrong Door** – SNAP-only clients are never in the wrong office. While TAO catchment areas will still determine such factors as where appointments are scheduled for hearings and other in-office appointments, SNAP-only clients can conduct their business at the TAO of their choosing.
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Centralized SNAP/SSI Office

With the implementation of BPR the Centralized SNAP/SSI office will be closed. Effective October 27, 2014, staff currently assigned to the Centralized SNAP/SSI office will be reassigned to the EOHHS: Chelsea Center and will become part of the statewide FAW SNAP team.

Cash and Combination Cases

The FAW model is exclusive to SNAP-only households. Cash and combination cases will continue to be managed under the caseload ownership and TAO assignment model.

The following SNAP households and applicants will not be part of the FAW model and will be managed under the cash caseload model:

- SNAP households containing a teen parent TAFDC client who is required to be in their parents’ SNAP household;
- SNAP households with an active ESP component whose TAFDC has been closed for less than 30 days;
- SNAP households with transitional child care services (TCC) whose TAFDC case has been closed for less than 30 days;
- Active SNAP clients applying for TAFDC or EAEDC benefits;
- Active TAFDC or EAEDC grantees applying for SNAP benefits separately; and
- Households that have been denied cash benefits for failure to submit required verifications within 30 days of the denial.

Clients whose cash case has closed but who have an active ESP case will have their ESP needs met by their assigned cash case manager or Full Engagement Worker. If there is an active SNAP case associated, it will be managed through the FAW model once the cash case has been closed for 30 days.

**Cash and
Combination
Cases
(continued)**

Only after a cash applicant or household member has been denied or closed from the cash case and none of the scenarios on the previous page apply, would an associated pending or active SNAP household become part of the FAW model. If a client has questions or concerns about an associated cash case after 30 days, they will be directed to a cash case manager or the Full Engagement Worker (FEW).

Generally, the switching between models based upon changes in case status will be performed during the nightly batch cycle. However, when an RFA is completed on a cash application for a client in an active SNAP case, the SNAP case will be reassigned to the Cash worker at the conclusion of the RFA.

Cash case managers will continue to use BEACON views to prioritize their work. However, the way in which cash case managers are notified when there are clients waiting to see them and when Urgent documents associated with a cash case are dropped off at the TAO, is changing. With BPR, cash case managers will receive 'Notifications' in BEACON when Urgent documents or in-office clients require their attention.

Cash and combination clients will be able to use the automated IVR services to get information about their case manager, case status, benefits and the date that the Department last received documents from them. They can also request address and phone number changes and Income Verifications without speaking with a case manager, saving time for both clients and cash case managers.

Cash case managers will also benefit from many of the BEACON changes being implemented as part of that are described later in this memo. Additional BEACON functionality changes and enhancements that support the cash programs are scheduled for early 2015.

Important: SNAP applications received online (web applications) will be assigned to FAW workers as Actions. Once the initial four Web Application pages are completed, if it is determined that the name cleared client is affiliated with a pending or active cash case, the SNAP case will be reassigned to the cash worker. The pending case will then appear on the cash case manager's Pending Application/Reinstatements view.

**Front Office
Operations and
Management**

Front office operations refer to the functions performed on-site at the TAO, including how clients are greeted in the reception area, client check-in and registration, how documents that are dropped off are handled, and clerical functions. Consistent front office operations across all TAOs is a vital part of the client experience.

*Greeter
Responsibilities*

With the implementation of BPR, when a client enters a TAO, he or she will be welcomed by a greeter. The greeter will provide the client with a standardized face sheet (a form on which the client will be asked to write key identifying information) and offer assistance completing it if necessary. The greeter will quickly assess the purpose of the visit and direct the client to the reception area (staffed by clerical staff).

Note: Additional information about the standardized face sheet and instructions for its use is forthcoming.

*Receptionist
Responsibilities*

The receptionist will register the client in BEACON, annotating the reason for the visit. During registration, if the client has an EBT card, they will be able to swipe it, using a magnetic card reader, and their information will automatically populate for the clerk. Otherwise, the receptionist will enter the client's available demographic information (first name, last name, SSN, or Agency Identification number), using the face sheet as much as possible to ensure that the client's personal information is kept confidential, to perform a client search in BEACON. The client will be assigned a Visitor Identification Number (VIN) and given a printed record of the number and the time that it was generated. The VIN cannot be used to search. For search criteria, see the BEACON Enhancements section of this memo.

*SNAP Case
Manager In-
Person Queue
Responsibility*

When the receptionist registers a SNAP client, an Action will be sent to the In-Person SNAP queue for handling by the FAW who requests an Action. That FAW must retrieve the client from the lobby, calling them by their Visitor Identification Number, instead of by name, to maintain client confidentiality.

*Cash Case
Manager
Responsibility*

When the receptionist registers a cash client who already has a pending or active case, a Notification will be sent to the assigned cash case manager, if available. If the assigned case manager is not available, the notification will go to a cash case manager allocated to the role of On-Demand. New cash applications will be assigned to case managers allocated to the Intake role. A Notification popup will prompt the cash case manager to retrieve the client from the lobby, calling them by number.

**Front Office
Operations and
Management
(continued)**

If the reason for the visit is an EBT request, clerical staff assigned to the role of EBT clerk will receive a Notification and assist clients on a first-come, first-served basis.

**WAC
Responsibilities**

The receptionist will direct the client to the WAC if the client does not have a scheduled appointment and has come to the office to:

- ask questions about how to apply for benefits;
- ask questions about a notice they received or case closure;
- report changes; or
- drop off documents.

The WAC is responsible for managing the overall waiting area, ensuring that traffic is well-managed. Whenever possible, he or she will perform simple case updates, explain notices, and provide an explanation of Department benefits, precluding the assignment of clients to the in-person queue. If case manager intervention is necessary, the WAC will create an in-person Action or Notification as appropriate.

If the client is dropping off a document, the WAC will determine its urgency (Urgent or Non-Urgent) and explain the EDM process to the client. The client will be given a supply of Business Reply Envelopes and be encouraged to mail their documents, postage free, or fax to the EDMC the next time.

If the document is Urgent, the WAC will indicate this on the Notification Detail page in BEACON, creating an in-person SNAP Action or a cash Notification so the appropriate case manager can accept the document and complete the task. These documents will be placed in a staging area behind the front desk in numerical order for case manager retrieval.

**Case Manager
Responsibility**

Case managers are responsible for preparing documents for transport to the EDMC after they have been entered in BEACON and are ready to be scanned. See Operations Memo 2014-33A: *Electronic Document Management (EDM) Release 2.0 – Clarifications* and Operations Memo 2014-58: *TAFDC, EAEDC, and SNAP - Back-Scanning of Permanent Verification and Indexing of All Documents by Household Member* for document transport preparation procedures.

With BPR, The *DTA Document Cover Sheet*, used to batch documents for transport to the EDMC, will be generated in BEACON. Pertinent client information and client specific codes will automatically populate on the form, enabling automatic indexing of scanned documents.

**Front Office
Operations and
Management
(continued)**

For Non-Urgent documents, the WAC, with clerical assistance, will print a separate cover sheet for each set of documents and prepare them for transport to the EDMC. The scanned documents will create Actions for FAWs, or populate views for cash workers. Workers can view documents through BEACON and link verification documents to clients on the Verification tab.

Courtesy phones will be placed in the reception area at all TAOs. These phones will be programmed to automatically dial the statewide Assistance Line, enabling clients to conduct business without waiting to be seen.

Important: Walk-in clients must always be reminded that they do not need to visit the TAO to complete most transactions. All staff must promote the statewide Assistance Line and advertise the statewide mailing address (EDMC) and the statewide fax number.

Notice to Clients

Clients will be informed about how the changes that are occurring as a result of BPR will impact them. This notice (Attachment A) will inform them that, effective October 27, 2014, SNAP-only clients will have a team of case managers helping them, that cash and combination clients will continue to be served by individual case managers, and the services that all clients will have access to by phone. The notice will be mailed to all active and pending DTA clients prior to implementation.

**BEACON
Enhancements**

With BEACON Build 46.5, the BEACON Home Page will look different for workers (i.e., cash case managers (caseload model) and SNAP case managers (FAW model)). The following changes will be implemented in BEACON:

- EDM functionality will be incorporated into BEACON. Scanned documents will be viewable, searchable, and able to be re-indexed, and dispositioned within BEACON.
 - The Scanned Document History popup page will allow users to search for all indexed documents within a user-specified time span via the Scanned Document History icon which is accessible on the Client Search page, and in the Document, Appointment, Letter and EBT tab in the Tools section of an Electronic Case Folder (ECF). This page will also be accessible by clicking the paperclip icon next to an item listed on the Verification tab to link verification document(s) to an individual client.
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**BEACON
Enhancements
(continued)**

- Users will have the ability to link one or more scanned documents to an item verified in the Verification tab resulting in a hyperlink that brings the user directly to the scanned document.
 - The Scanned Document Preview popup page will display a full screen preview of a scanned document, without the indexing information. This page will be accessed through the Scanned Document Preview icon on the Scanned Document History page.
 - Users will have the ability to preview, update the status of, and re-index documents via the Scanned Document Details popup page, which will be accessed through the Scanned Document Details icon on the Scanned Document History page.
 - Unidentified scanned documents will be searchable in the Unidentified Document Search page in the Scanned Documents section of the My Office tab. Users can search for documents within user-specified two month increments.
 - The *DTA Document Cover Sheet*, used to batch documents for transport to the EDMC will be generated in BEACON and populated with pertinent client information and client specific codes, enabling automatic indexing of scanned documents. The cover sheet contains a Yes/No field to indicate whether or not the document data has been “Entered in BEACON.” These forms will be printed via the DTA Document Cover Sheet popup page accessible via the DTA Document Cover Sheet icon on the Client Search page as well as in the Document, Appointment, Letter and EBT tab in the Tools section of the ECF. Once printed, the cover sheet will not be stored in BEACON Document History.
 - In-office client visits will be registered in the Registration page in BEACON, assigned a Visitor Identification Number, and given a printed record of the number and the time that it was generated. Clerical staff, supervisors, managers and cash case managers will have access to this page.
 - The registration of Urgent documents and in-office clients needing cash case manager attention will result in Notifications received by the assigned case manager.
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**BEACON
Enhancements
(continued)**

- The registration of Urgent documents and in-office clients needing SNAP case manager attention will result in Actions to be pulled by the next available case manager assigned to the In-Person Queue.
- The Registration Search page will allow case managers and others to search a client's registration history for the period of time specified by the user. It will display the registration number; reason for registration; wait time; visitor ID number; and the name of the staff to which the Action or Notification was assigned.
- Using the Registrant's and Actions views, authorized users will be able to access lists of all of the outstanding, completed and dismissed Notifications and in-office Actions in the TAO, with registration and wait times and the names of the DTA staff to whom they are assigned.
- A nightly batch job will issue *Notice of Missed Interview (NOMI)* letters when scheduled SNAP application or recertification interviews have been missed (an interview was scheduled and the Interview page does not indicate that an interview has been conducted as of close of business on the scheduled date).
- Approval of expedited SNAP benefits will no longer require supervisory sign off except for case managers who are probationary staff or who are on corrective action.

BEACON Updates for FAW Model Case Managers:

- The Action tool bar will display across the top of the Home Page screen, indicating the case manager's availability and number of assigned outstanding Actions. It will allow access to My Action Details popup page and allow the case manager to begin, put on hold and end assigned Actions.
 - The BEACON Action Engine will be responsible for identifying, prioritizing and balancing Actions among SNAP case managers. This engine is updated in real time so, as they are scanned at EDMC, documents will be prioritized in the queue for processing. Actions will be generated via:
 - scanned and indexed electronic documents;
 - phone calls;
 - system reminders;
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**BEACON
Enhancements
(continued)**

- online (web) applications;
 - the registration of Urgent documents dropped off at the TAO and TAO walk-in clients; and
 - manual creation (e.g. follow-up Actions)
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- The My Actions page will be used to display the queue to which a case manager is assigned, allow case managers to change queues when directed to do so, indicate languages spoken by the case manager, and to both create and request Actions. Additionally, the case manager will be able to view Actions assigned to them, view Action detail, and start, pause or complete assigned Actions from this page.

Note: Case managers are only allowed to change from one queue to another, when instructed by a manager.

- The My Action Details popup page will display the Action type, the Action Group Steps required to complete the Action, the Business and Action Due Dates, and the current Status of assigned Actions. From this page, case managers will write Action related comments that will automatically transfer to the Narrative tab in the electronic case file, view Outstanding Actions associated with the case, re-register clients who must see an EBT clerk, and self-assign follow-up Actions generated as the result of an expedited authorization that needs to be wrapped for ongoing approval on day two. This page can be accessed via the Info button on the Action toolbar, the My Actions page, and the Action Search page. It will also open when the user clicks the End button on the My Actions toolbar on the Home page or in the My Actions page.
 - All Actions affiliated with a case that have not been completed will display in the Outstanding Actions popup page. This page is accessible via the Outstanding Actions button in the My Action Details popup page. When an Action is requested, the case manager must look for, self-assign, and complete as many steps as are possible for all the outstanding Actions associated with the case.
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**BEACON
Enhancements
(continued)**

- Case managers will have the ability to create Actions in the Create Action popup page (used to create Actions generated as a result of phone calls and in-person client interactions). When a client's information is entered on this page, BEACON will search for and display existing Actions associated with the case. When Actions already exist for the household, the case manager must click the Assign button to self-assign and work the outstanding Actions. When there are no existing Actions for the household, the case manager must select the Action group, type and queue information from dropdown lists and self-assign the newly created Action. This page is accessible via the Create Action button in the My Actions page.
 - The Action Search page allows users to search for all actions, outstanding or completed, associated with a client within a 60 day period. When the page is opened, the date range will be set to the most recent 60 day period. The user will have the ability to adjust the date range to search actions generated within any 60 day period. From this page, which is accessible through the My Office tab and through the Action Search icon on the Client Search page, the user will be able to view the status and details of an action and export search results to an Excel document.
 - For clients who need an interview, the Phone page will be updated to require that a FAW case manager document that an attempt to reach the client by phone has been made. This step must be taken before an appointment is scheduled.
 - When a case manager completes an action for which follow-up is needed (removing terminated income, for example) s/he will check the Follow-up checkbox on the Action Details page, creating the future action. When the Self-assigned checkbox is checked, the follow-up action will be assigned to the case manager who created it. When creating follow-up actions, the reason for the follow-up must be clearly narrated.
 - After a case manager completes an EBC calculation that requires supervisory authorization, the Action will be available in the supervisor's pool in My Actions. If a worker's supervisor is not logged into BEACON or already has too many cases awaiting review, the case will be assigned to another supervisor. EBC calculations completed by supervisors that require TAO director authorization will appear in director's pool in My Actions.
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**BEACON
Enhancements
(continued)**

- Interview Wrapup requests resulting from Actions created in a TAO, like the processing of Urgent documents, will not be assigned to supervisors or managers outside of the TAO for authorization.
- If a supervisor rejects an Interview Wrapup request, the action will be returned to the case manager who authorized it. This is an exception to the one Action per worker requirement.
- Existing SNAP views will be replaced with the following views that will be displayed for the current day only.
 - ✓ Today's Actions view, found in the Actions section under Views. A SNAP-only case manager will see information about Actions that were assigned exclusively to him/her. Supervisors will see Actions assigned to case managers that they supervise and their own Actions.
 - ✓ Waiting/Being Served view, found in the Registrants section under Views, will be used to track in-office client visits that are in progress or waiting for service office-wide.
 - ✓ Completed/Dismissed view, found in the Registrant's section under Views, will be used to track completed or dismissed in-person Actions and Notifications office-wide.
 - ✓ Dropped off Documents view, found in the Registrant's section under Views, will be used to track completed, dismissed and outstanding Actions and Notifications created as a result of documents dropped off at the TAO office-wide.

BEACON updates for Caseload Ownership Model (Cash) Case Managers:

- The Notification tool bar will display across the top of the Home Page screen, indicating the case manager's availability, number of Notifications assigned and buttons to pause or complete work on a Notification that is in progress.
 - The My Notifications page will be used to sign into duty groups. Here, a cash case manager will view a list of their assigned Notifications, view Notification detail, perform case research associated with Notifications, and start, pause or complete assigned Notifications.
-

**BEACON
Enhancements
(continued)**

- The Notification Detail page will display the Notification details including the client information, reason for the Notification, the date a document was received and whether it is Urgent or Non Urgent, and the current Status of the Notification. From this page, case managers will be able to write comments which will automatically transfer to the Narrative tab in the electronic case file , print cover sheets for transporting processed or Non Urgent documents to the EDMC, update the status of a Notification and re-register clients who need to see another case manager or an EBT clerk. This page can be accessed via the Info button on the My Notifications page.

- In addition to the views that are currently available to them, cash case managers will have the following views displayed for the current day only:
 - ✓ Notifications view, found in the Registrant's section under Views. A cash case manager will see information about Notifications that were assigned exclusively to him/her. Supervisors will see Notifications assigned to case managers that they supervise and their own Notifications.
 - ✓ Waiting/Being Served view, found in the Registrant's section under Views, will be used to track in-office client visits that are in progress or waiting for service office-wide.
 - ✓ Completed/Dismissed view, found in the Registrant's section under Views, will be used to track completed or dismissed in-person Actions and Notifications office-wide.
 - ✓ Dropped off Documents view, found in the Registrant's section under Views, will be used to track completed, dismissed and outstanding Actions and Notifications created as a result of documents dropped off at the TAO office-wide.

Using these views, a cash case manager will see information about Notifications that were assigned exclusively to him/her. Managers, supervisors and clerical staff will see this information for Actions and Notifications assigned office-wide.

- IVR Requests – Unvalidated Address view, under Daily Priority Actions in the My Office tab, displays a listing of clients who reported address changes via IVR that could not be automatically validated and now require case manager follow-up.
-

**BEACON
Enhancements
(continued)**

- In other business views, including Monthly Reporting, School Attendance Tracking, Reevaluation Due, and Verification Due, a column has been added to display if unprocessed scanned documents are available for the case.
- Available/Reviewed Scanned Documents page, found under Daily Priority Actions in the My Office tab, will display all unprocessed scanned and indexed documents associated with cases in a case manager's caseload.

More detailed information and instructions for using new BEACON functionality will be available in the BPR Standard Operating Procedures Manual and in the BPR book in the soon to be implemented Online Guide.

**Training and
Preparation**

Department staff **must** apply policy consistently and ensure that eligibility information is verified and client inquiries are addressed uniformly. In preparation for BPR, the following tools will be made available to all staff to reinforce standardization and prepare for the substantial procedural changes ahead:

- Mandatory job specific classroom training;
 - Standardization Webinars;
 - A Sandbox environment in which to explore and practice working with upcoming BEACON changes;
 - BPR training material will be available online;
 - Desk Guides;
 - Job Aids;
 - Phone and Narrative Templates;
 - Online Guide; and
 - In-office support provided by DTA Trainers and Champions of Train.
-

iCatalyst

On September 18, 2014, the Department launched a new communication tool, iCatalyst. Staff is encouraged to use this tool to share ideas, tips and comments about these business process changes and other Department initiatives.

**Other
Information and
Reminders**

*Case Manager
Responsibilities*

Expedited SNAP Approval: With BEACON Build 46.5, scheduled for October 27, 2014, approval of expedited SNAP benefits will no longer require supervisory approval. All SNAP case managers with the exception of those who are probationary and those who are on corrective action will be allowed a single signature sign-off. Case managers are reminded that all SNAP applicants must be screened for expedited eligibility. Eligible applicants must receive expedited SNAP benefits no later than seven days from the date of application. Please keep this in mind when scheduling appointments for SNAP interviews.

Interpreter Services: To comply with federal law, The Department must advise clients of the right to professional interpreter services regardless of language, national origin or citizenship status and must provide interpreter services to clients whose primary language is not English. For detailed information about interpreter services see Operations Memo 2013-11: *Department Interpreter Services Procedures*.

Document Management: In accordance with instructions transmitted in Operations Memo 2014-58: *TAFDC, EAEDC, and SNAP - Back-Scanning of Permanent Verification and Indexing of All Documents by Household Member*, scanned verifications and other documents must be indexed under the household member to whom they apply.

Note: As case managers encounter documents that are indexed incorrectly, they must re-index them to ensure that they are linked to the correct individual in BEACON.

It is especially important that all scanned documents are indexed using the correct Agency Identification Number, as this is how the documents are linked to the correct cases in BEACON. Remember that new applicants may not yet have an Agency Identification Number at the time that documents are scanned so case managers must add this information to the indexing information when it becomes available.

Scheduling Appointments: When SNAP case managers are assigned new applications or recertifications as Actions, they must attempt to reach the client for an interview on the same day (unless there is no phone number listed on the application and in BEACON). If the effort to reach the client by phone is not successful, the cold call attempt must be documented on the Phone page in BEACON and an appointment for interview must be scheduled. SNAP-only appointment letters generated on or after October 27, 2014 will not be scheduled with a specific case manager and, while the letter will indicate a date and time for the interview, clients will be informed that they can call the Assistance Line to conduct the interview at any time prior to the scheduled interview.

**Other
Information and
Reminders
(continued)**

IVR System Prompt for Interview: Authenticated callers to the Assistance Line who have been scheduled for SNAP-only interviews or who have submitted recertification paperwork and need to be interviewed within 45 days will hear a message telling them that an interview is needed and offering them the opportunity to conduct the interview during the current call. Clients who choose to do so will be transferred to the next available SNAP case manager. Case managers who conduct interviews prior to the client's scheduled date and time must cancel the upcoming appointments to eliminate unnecessary Action.

Key as You Go: Case managers must complete BEACON pages and enter case data while they have clients on the phone or in front of them.

Escalated Calls: If, during a phone call, a client asks to speak with a supervisor, they must be transferred to a live person. The case manager transferring the call must make sure that the person to whom they are sending the call is available and provide a brief summary of the reason for the transfer before putting it through. If a case manager's supervisor is not available, the call must be transferred to the backup supervisor. For additional information, see DTA BEACON, Assistance Line Training & Effective Work Strategies for SNAP Workers PowerPoint Presentation (available in the BPR folder of Policy Online).

Narratives: For SNAP-only cases, narratives written through the comments section on the My Action Details page will automatically transfer to the Narrative tab in the electronic case file and will be available to case managers viewing the Action details in the future. As narratives written directly through the Narrative tab in the electronic case file will not transfer to the My Action Details page, case managers are encouraged to write all narratives as comments through the My Action Details page and not directly into the Narratives tab

Mass 211 Search: Under the FAW model, SNAP case managers will be assisting clients from all over the state and may not be familiar with the organizations and other agencies that provide assistance in the area in which the client lives. Staff is reminded that Massachusetts 211 Search is accessible under the Useful Links section on the BEACON Homepage.

Questions

If you have any questions, please have your Hotline designee call the Policy Hotline.

P. O. Box 129562
Boston, MA 02112
BPR 2014

Massachusetts Department of Transitional Assistance

Mary Jones
101 Main Street
Roxbury, MA 02119

Agency ID: 9999999

10/19/2014

Dear Mary Jones:

DTA will begin serving you differently in October 2014.

DTA has a new way of helping you. Beginning on October 27, 2014 you will be able to do most of your business over the phone. This will save you time and trips to the office! We will be able to serve you better.

Call us at 1-877-382-2363.

You can use this phone number to:

- Check information about your application or benefits at any time
- Get general information about EAEDC, TAFDC and SNAP, during regular business hours
- Talk to a case manager to finish a SNAP interview or other SNAP business during regular business hours
- Ask for a SNAP application at any time
- Update your address and phone number at any time
- Ask for an Income Verification letter at any time
- Speak to someone about Domestic Violence help
- Request an Accommodation to help you meet DTA requirements

Speaking directly to a case manager.

If you get only SNAP benefits and need to speak to a case manager, you will not have one case manager as you do now. Instead, you will have a team of case managers who will be able to serve you quickly!

If you get only cash benefits or cash and SNAP benefits together and need to speak to a case manager, you will be able to speak to your case manager as you do now.

Avoid lines!

The fastest way to get forms/documents/verifications to a case manager is by mailing them (with your name, Agency ID or birth date on each document) to:

DTA – Document Processing Center

PO Box 4406

Taunton, MA 02780-0420

Or for faster service, Fax them to: 617-887-8765.

Have other questions?

See the other side of this notice for answers to some common questions.

Call 1-877-382-2363 for more information.

Who is my SNAP worker?

Any of our SNAP workers can work on your case. Instead of having one person in your corner, there are more people to serve you.

Why don't I have my same SNAP worker?

Starting October 27th, instead of having to wait for *your* worker to be available, your questions and concerns can be answered by the first available worker. This makes sure your case is handled quickly and effectively.

What if I only want my worker?

We know you may want to talk with someone you are familiar with, but we don't want you to wait for *your* worker when another worker can help you sooner.

What if I want to speak to the last worker I spoke to?

There is no need. All of our workers are trained to help you.

Who do I report changes to?

Address and phone number changes can be reported by calling 1-877-382-2363, if you speak English and Spanish. If you speak a different language or have other changes to report, you can still call that number. Your call will be sent to the next available worker who can make those changes for you with the help of a translator, if necessary.

What if I want to come to the office and meet with a SNAP worker? Who will I see?

The best way to get information and make changes is by phone. You can still come to the office to meet with a worker.

If I give my documents to someone at the office, will it be worked on right away or sent to someone else to finish?

We always move quickly to work on your case, whether at the office or through the Document Processing Center. The best way to provide us with documentation is to use the Document Processing Center P.O. Box 4406, Taunton, MA 02780-0420 or fax the documentation to 617- 887-8765. It will save you time and mailing costs.

More questions?

Many of your questions can be answered by calling 1-877-382-2363.