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Department of Transitional Assistance Report on Agency Paper Reduction Efforts

February 2018

Massachusetts Department of Transitional Assistance



REPORT ON PAPERLESS DOCUMENTATION
FEBRUARY 2018

Department of Transitional Assistance Mission

The mission of the Department of Transitional Assistance (DTA) is to assist and empower low-income individuals and families to meet their basic needs, improve their quality of life, and achieve long-term economic self-sufficiency. DTA offers a comprehensive system of programs and supports to achieve this mission, including food and nutritional assistance, economic assistance, and employment supports. DTA serves one out of every eight people in the Commonwealth including working families, children, elders, and people with disabilities.

Description of the Report

Chapter 158 of the Acts of 2014 Section 32 requires DTA to develop, implement, and maintain a plan to reduce the use of paper records and documentation and to eliminate the sole reliance on paper records for its operations. The plan must progressively eliminate the need to use hard copies of forms. Progress in meeting these requirements is hereby submitted to the clerks of the House of Representatives and the Senate.

DTA's Paper Reduction Efforts

DTA partnered with the Executive Office of Health and Human Services (EOHHS) and MassHealth to implement an Electronic Document Management Center (EDMC) located in Taunton, Massachusetts. EDMC was envisioned as the backbone of DTA's paper reduction efforts and was designed to manage applicant and client eligibility documents, as well as documents used by DTA's hearings and program integrity units. The goal of the EDMC was to improve client case processing by providing streamlined, accurate and timely indexed case files that could be readily accessed by DTA caseworkers throughout the state.

Since January 2014, major phases of the EDMC implementation included:

- Re-routing all DTA local office physical mail to the EDMC for digital scanning and indexing;
- Scanning new client documents and applications received by local offices directly to the EDMC;
- Scanning existing documents on file within DTA's local offices so they could be indexed and available electronically by caseworkers in any local office; and
- Installing scanning devices in DTA local office waiting rooms so clients could efficiently "self-serve" and scan their own documents into the EDMC.

Additionally, in 2017 DTA launched new functionality on its DTA Connect mobile application that allows clients to submit documents to the EDMC through the mobile app by merely taking a photo of the document they are submitting.

All of these paper reduction efforts were deployed successfully and DTA has progressively reduced its reliance on paper documents by developing new, streamlined methods for clients to submit required documents. Evidence of this reduced reliance on paper records is apparent by comparing the year-to-year percentage decreases of mail submissions to the EDMC over the last three years. In 2015, over 40% of documents were mailed to DTA; by 2017, that percentage had dropped to 20%.

EDMC Document Source	2015 volume		2016 volume		2017 volume	
Mail	920,589	42%	572,786	25%	541,775	20%
Electronic Fax	607,960	28%	552,997	24%	452,561	17%
Multi-functional device scan from DTA local office*	670,300	30%	1,186,082	51%	1,363,839	50%
DTA Connect mobile application**	0	0%	0	0%	369,004	14%
TOTAL***	2,198,849	100%	2,311,865	100%	2,727,179	100%

*Scanning device rollout to all DTA local offices was completed in January 2017

**DTA Connect mobile application document uploading capability was launched in 2017

***Each document averages 7 pages

In addition to efforts to reduce paper records coming into its offices for processing, DTA recently launched a project to eliminate all historical paper case records and move to a system of all electronic case files. As part of this project, DTA's local office staff has begun back-scanning permanent documents for active cash and SNAP case files. It is anticipated the back scanning will be fully complete in April 2018. At that time a request will be submitted to the Secretary of State's Office, Records Conservation Board to request permission to destroy the paper case files. If permission is granted by the Records Conservation Board, on-site shredders will be scheduled for all TAOs in order to securely destroy the obsolete paper case records. In total, DTA anticipates about 4,360 boxes of paper files will be destroyed after the scanning is complete, and just over 1,435 file cabinets will be removed from DTA's local offices.