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Executive Office of Health and Human Services
Department of Transitional Assistance
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Field Operations Memo 2003-10
March 21, 2003

To: Transitional Assistance Office Staff

From: *cd* Cescia Derderian, Assistant Commissioner for Field Operations

Re: Shelter Information Now in BEACON

Overview

As of March 24, 2003, all family shelter information will be in BEACON. BEACON will have a resource list of all EA shelters. The specific shelter information will be associated for each EA AU in shelter. This information will enable the Department to identify where each EA AU has been placed and will provide statistical information on demographics at specific shelter sites. These instructions should be considered Phase 1 of EA AU information in BEACON.

Note: For the purpose of this memo, all references to “shelter” include: congregate shelter, scattered site shelter, transitional shelter, substance abuse shelter, domestic violence shelter, hotels and motels.

Families in shelter known to SSPS and the Housing Unit’s systems were compared with active EA AUs in BEACON. Some families known to SSPS did not have an active EA AU; some active EA AUs were not known to SSPS or the Housing Unit systems. For those families that matched (active EA AU and on SSPS or the Housing systems), a data fix will be run to update the shelter information for each EA AU. A report of families that did not have active EA AUs was sent to TAO Directors on 3/14/2003 for review and action by 3/21/2003. A report of the families that have an active EA AU but not receiving shelter benefits through SSPS will be produced and sent to the appropriate TAOs at a later date for follow-up.

**Overview
(continued)**

- Information on every EA shelter facility, including the name of the shelter, the shelter's address, and the shelter's FEIN (Federal Employer Identification Number) or vendor number has been programmed into BEACON.
- With this information in BEACON, DTA staff will be able to confirm the location of a particular EA AU or all EA AUs at a particular shelter within the past 60 days.
- On March 23, 2003 the appropriate shelter facility information, based on the last known placement location, will be automatically updated to each active EA AU.
- Effective March 24, 2003 the AU Manager or Homeless Coordinator will be responsible for entering the shelter data on new EA AUs placed in shelter.
- Effective March 24, 2003 the AU Manager or Homeless Coordinator will be responsible for maintaining the accuracy of the shelter information and ensuring that the transfer and termination information are accurately entered for each EA AU in BEACON.
- This Field Operations Memo gives new procedures on processing these EA AUs on BEACON.

**BEACON
Changes**

Several changes have been made to BEACON:

- ***View:***
 - A new view, "*EA AUs in Shelter within Last Two Months*" will list EA AUs that are in a shelter or have exited the shelter within the last two months. It will also show a history of the shelters the EA AU has been in during the past two months.
 - ***Request for Assistance window:***
 - This window has new Primary Application reasons that are specific to an EA application for shelter benefits. The reasons are: Fire, Natural Disaster, Eviction, Health/Safety - overcrowded, Health/Safety - sanitary code, Health/Safety – other, and Severe Medical Reason.
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**BEACON
Changes
(continued)**

- ***Address window:***
 - When a mailing address is entered, the Homeless indicator is checked and the window is saved and exited, the Residential Facility window will be made available. The AU Manager or Homeless Coordinator must select the Residential Facility window from the Assessed Person Nonfinancial Statement workflow.
 - When the Facility Name is selected, the shelter's address will be automatically entered in the Current Residence field on the Address window.

 - ***Residential Facility window:***
 - TAOs use the shelter vacancy information provided by the Central Office Housing Unit to determine shelter placements.
 - Select this window from the Assessed Person Nonfinancial Statement workflow.
 - Information of an EA AU entering a shelter, including the start date, the reason for shelter, the shelter name and shelter type are entered on this window. When the Facility Name popup is selected, the Resource Search window will be made available.
 - Information on an EA AU exiting a shelter and the exit reason are entered on this window.
 - When an EA AU is transferred from one shelter to another, this window must be updated with the exit shelter information, then the start shelter information (date the new placement begins) is entered as a new record.

 - ***Resource Search window:***
 - This window shows the EA shelter resources broken down by shelter types: congregate shelter, scattered site shelter, transitional shelter, substance abuse shelter, domestic violence shelter, hotels and motels. The Central Office Housing Unit is responsible for maintaining an up-to-date listing of all shelter types along with the names and addresses of the shelters. Once the facility (shelter) is selected, the address of the shelter will be added automatically to the Address window and the residence type will be changed automatically to "shelter."
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**BEACON
Changes
(continued)**

- ***Program Administration – Reevaluation:***

A reevaluation of EA eligibility may be initiated for an EA AU by selecting Reevaluation. An EA reevaluation includes:

- categorical issues – a dependent may have reached age 21, if the “needy child” changes, an adult in the EA AU may not have a relationship to the new needy child; and
- financial issues – verification of earned and unearned income and verification of assets

A Reevaluation is not the same as the Self-Sufficiency Plan which continues to be updated monthly. During the Self-Sufficiency Plan update AU Managers and Homeless Coordinators should be aware of categorical or financial changes that may impact the AU’s EA eligibility.

- The data fix on 3/23/2003 set the reevaluation period for an active EA AU. The Reevaluation Start Date was set to the shelter entry date and the Reevaluation End Date was set to the shelter entry date plus six months.
- The End Date for the reevaluation may be adjusted to reflect family circumstances. Prior to the end date, the EA AU will appear on the *Reevaluation Due* view that is found under *Appointments to Schedule*. An EA AU is not automatically closed at the end of the reevaluation period.

- ***Interview Wrap-up EBC Results Tab***

- The Reevaluation End Date and Type must be entered when an EA AU’s status is changed from pending to active and if a Reevaluation is being completed on an active EA AU. The Reevaluation Start Date will be defaulted to the current date and the Reevaluation Type will be defaulted to Reevaluation. The Reevaluation End Date is six months or less from the Reevaluation Start Date depending on the family circumstances.

- ***Interview Wrap-up Authorization***

- A message will appear when a closing is being authorized on an EA AU but an exit date was not entered on the Residential Facility window. The message instructs the AU Manager or Homeless Coordinator to return to the Residential Facility window and enter an exit date.
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EA Applicants

Effective March 24, 2003, AU Managers or Homeless Coordinators become responsible for entering the shelter facility information on the Residential Facility window of BEACON for each EA applicant AU that is placed in shelter.

Responsibilities of the AU Manager or Homeless Coordinator:

- Complete the Request for Assistance in the usual manner making sure to:
 - Select one of the new Primary Reasons;
 - Enter the TAO's address as the Mailing Address for a homeless EA AU;
 - Indicate Homeless on the Address window;
 - Deduct \$148.50 for free shelter from the associated TAFDC AU; and
 - Answer the question on the Residential Facility window regarding "in residential facility". At this point in completing the request for assistance, a shelter generally has not yet been located, therefore the answer is No and enter the current date as the start date. If a shelter placement is known, then the answer is Yes.
- Once a shelter placement has been secured for the eligible EA AU:
 - Go to the Residential Facility window and select Yes to the question "in residential facility";
 - Enter the start date of the placement at this particular facility;
 - Use the dropdown box to select the reason for the placement - select the same reason used in the Primary Application reason: Fire, Natural Disaster, Eviction, Health/Safety - overcrowded, Health/Safety - sanitary code, Health/Safety - other, and Severe Medical Reason;
 - Click the popup box next to Facility Name and the Resource Search window will appear;
 - On the Resource Search window, use the General Services dropdown box to select the type of shelter;
 - Click find; and
 - Find the name of the appropriate shelter and Select. The shelter's name will prepopulate as the Facility Name on the Residential Facility window and the shelter's address will prepopulate on the Address window.
- Go to Interview Wrap-up EBC Results tab.
 - Complete EBC on the pending EA request; and
 - Be sure to enter a Reevaluation End Date for the pending EA AU's status to change from pending to active. The Reevaluation Start Date is defaulted to the current date and the Reevaluation Type is defaulted to Reevaluation.
- Manually complete the appropriate forms: including the EA-1, the SSPS invoice, the NFL-9, the TESR-1 and 3, HM-NT and the EA-15.

**EA Applicants
(continued)**

Note: Shelter information in BEACON has not replaced the need to complete SSPS invoices. Any impact on SSPS invoices will be addressed in Phase 2, including instructions.

EA Recipients:

The AU Manager or Homeless Coordinator is responsible for keeping the shelter information in BEACON up-to-date. Use the Views, *EA AUs in Shelter within Last Two Months* and *Reevaluation Due*.

**Terminating
Shelter Benefits
or Transferring
to Another
Shelter**

If the EA AU is being transferred to another shelter or the EA AU is no longer eligible for EA shelter benefits, the AU Manager or Homeless Coordinator must enter the **exit information** on the Residential Facility window:

- Go to the Residential Facility window;
- Select the current shelter;
- Enter the exit date and reason;
- Click Update;
- Enter on the EA-1 and the SSPS invoice the last day in this shelter and give to the Data Entry clerk.

If the EA AU is being transferred to another shelter, after the exit information has been saved on the Residential Facility window, the AU Manager or Homeless Coordinator must enter the new shelter information on the Residential Facility window:

- Click Clear to remove all information from the window;
- Enter Yes to In Residential Facility;
- Enter the start date for the new shelter placement and the reason; and
- Click on the popup box for the Resource Search window to be made available;
- Use the dropdown box in General Service field to find the type of shelter here the EA AU was placed;
- Click find and all the shelters associated with that type will appear;
- Select the shelter where the EA AU has been placed. When the shelter is selected, the shelter's address will be added to the Address window;
- Complete the EA-1 and an SSPS invoice for the new shelter and give them to the Data Entry clerk; and
- Manually complete the appropriate forms, including the SSPS invoice and the shelter transfer notice (TES-TR-1 or TES-TR-3).

Note: Shelter information in BEACON has not replaced the need to complete SSPS invoices. Any impact on SSPS invoices will be addressed in Phase 2, including instructions.

Questions

If you have any questions, please have your Hotline designee call the Policy Hotline at 617-348-8478.
