



**Commonwealth of Massachusetts**  
*Executive Office of Health and Human Services*  
**Department of Transitional Assistance**  
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**Field Operations Memo 2003-11**  
**April 15, 2003**

**To:** Transitional Assistance Office Staff

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

**Re:** Resolving EA Information on BEACON

**Background**

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Field Operations Memo 2003-10 addressed the comparison of SSPS information of families in shelter with active EA AUs on BEACON. From this comparison, two groups of names were created:

- On 3/14/2003, a list was sent to TAO Directors of families known to SSPS but without active EA AUs. Staff were instructed to review and take the appropriate action.
- The remaining names are families with pending or active EA AUs but with no shelter information on SSPS.

The purpose of this memo is to instruct staff on:

- taking actions on the pending or active EA AUs that are not known to SSPS. The names are found on View: *EA AUs in Shelter within Last Two Months*;
- updating the record when the AU's EA benefits are being terminated and the AU's TAFDC benefits are being changed or terminated due to income, including entering the last date of shelter on the EA-1 for entry on SSPS;
- taking and processing a HAP application;
- adjusting or voiding an SSPS hotel/motel invoice; and
- putting the hotel/motel vendor number on SSPS invoices.

**Note:** For purposes of this memo, all references to “shelter” include: congregate shelter, scattered site shelter, transitional shelter, substance abuse shelter, domestic violence shelter, hotels and motels (when the shelter is paid through the EA program.)

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**View: EA AUs in Shelter Within Last Two Months**

The Department's objective is for all EA AU's on BEACON to accurately reflect families in shelter. To help keep shelter information in BEACON up-to-date, the View *EA AUs in Shelter within Last Two Months* has been created. In addition to listing EA AUs that have been in shelter within the last two months, the View also shows the names of pending or active EA AUs that are not in a shelter. This is a temporary means of showing EA AUs not in shelter. After the non-EA shelter AUs are disposed of, the View will return to showing only AUs in shelter within the last two months. To find the *EA AUs in Shelter within Last Two Months* View, go to the TAO Office Explorer, Assistance Unit Lists.

The view has eight columns:

- Client – the name of the EA AU grantee;
- SSN – the SSN for the EA AU;
- Status - the status of the EA AU;
- Start - the start date of the EA AU;
- Exit - the exit date from shelter;
- Vendor - the vendor number for the shelter;
- Type - the type of shelter where the EA AU is placed; and
- Name - the name of the shelter.

If the shelter information was not found on SSPS, the Start, Exit, Vendor, Type and Name columns are blank.

AU Managers must review the information on the View and find the EA AUs that do not have shelter information. Listed below are reasons why the EA AU is active but no shelter record is found on SSPS. Appropriate action on these EA AUs must be taken by the AU Manager by May 1, 2003.

- Recently placed EA AU and the information on SSPS occurred after the 3/21/2003 match date. The AU Manager is responsible for entering the shelter information and must:
    - ensure Homelessness is checked off on the Address window;
    - 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;
    - 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 and click Find;
    - find the name of the appropriate shelter and click 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;
- Note:** Ensure the mailing address is correct and reflects the actual residence. This is particularly important for scattered sites.

**View: EA AUs in  
Shelter Within  
Last Two  
Months  
(continued)**

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- authorize the action on the Interview Wrap-up window; and
  - make sure an EA-1 and SSPS invoice have been completed.
  - Received rental arrearage payments or disaster benefits last year and the EA AU remained open after the services were provided. The EA AU must be closed. Review the AU record and SSPS to determine the last day the AU received the EA benefit. That is the date that must be used as the EA close date on SSPS to ensure a future request for EA assistance is accurately based on “EA not more than once in a 12-month period.”
    - Go to the AU Composition Results window, select the EA AU and select Program Rules as the Reason Category and “EA benefits provided – no other benefits pending” as the Reason.
    - Go to Interview Wrap-up and process the EA closing. BEACON will not accept a closing date in the past therefore, the EA will show as closed with a future date.
    - **Important! Because the actual closing date will not appear on the Results tab, a message about the EA closing with the actual date must be entered on the Narrative tab to ensure the correct counting of 12 months if the AU applies for EA in the future.**
    - Submit the EA-1 or screen copy with the start date of that EA period and the actual closing date (example: 4/5/2002) to the Data Entry Clerk for entry on the SSPS *Close EA – Entry* screen.
  - Created an EA AU to provide only HAP services. Whether or not HAP services are still being provided, the AU Manager must close the EA AU on BEACON. The closing date for EA HAP services is the original date of the EA application. The only EA AUs on BEACON will be those AUs in shelter placement.
    - Go to the AU Composition Results window, select the EA AU, select Program Rules as the Reason Category and “EA benefits provided – no other benefits pending” as the Reason.
    - Go to Interview Wrap-up and process the EA closing. BEACON will not accept a closing date in the past therefore, the EA will show as closed with a future date.
    - **Important! Because the actual closing date will not appear on the Results tab, a message about the EA closing with the actual date must be entered on the Narrative tab to ensure the correct counting of 12 months if the AU applies for EA in the future.** This is the only systems record that the EA closing is dated in the past.
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**Income  
Countable to  
both TAFDC and  
EA AU**

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The benefit effective dates (closing dates) for EA AUs are tied to TAFDC AU closing dates. When the EA AU is processed in the Interview Wrap-up Results window, the benefit effective date is triggered by the SSN, as in TAFDC. **When EBC is being performed on a TAFDC and an EA action at the same time or within the same period, both actions will be combined into one release. The two transactions will be combined in one pending authorization and cannot be authorized separately.**

When the AU is both EA and TAFDC and the AU's income may result in termination, doing a "What If" calculation lets the AU Manager know if the AUs will close.

- Follow the procedures for entering the income on the Earned Income or Other Income Status window.
- Follow the procedures for entering the shelter exit information on the Residential Facility window, if the AU is no longer eligible for EA shelter benefits. The shelter exit date is the same termination effective date that is entered on the NFL-9. (For a closing due to income, count 10 days plus 30 days from the date of mailing.) The pending authorization, which includes both the TAFDC and EA close action, cannot be authorized if a shelter exit date is not entered on the Residential Facility window.

If the shelter exit does not occur on the date entered, return to the Residential Facility window and modify the exit date or remove the exit information completely. Once the EA AU is no longer active, the Residential Facility window will be grayed out, preventing updates to the window.

- Go to Interview Wrap-up, select both the TAFDC and EA actions, complete an EBC Results and Calculate.
- Authorize the actions on the Interview Wrap-up window.

TAFDC and EA AUs are connected for eligibility purposes in BEACON. Closing an EA AU on BEACON does not terminate SSPS services.

**Appropriate action must be taken on SSPS to close the EA services on the appropriate date.**

**Important! Because the actual closing date will not appear on the Results tab, a message about the EA closing with the actual date must be entered on the Narrative tab to ensure the correct counting of 12 months if the AU applies for EA in the future.**

The shelter exit date entered on the Residential Facility window reflects the date the EA AU left (abandoned shelter two days ago) or is expected to leave (10 day or 40 day notice is a future date) the shelter placement. The exit date can be modified.

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**HAP  
Application:  
EA-3 Form**

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Although HAP (Housing Assistance Program) services are an EA benefit, when an applicant is requesting **only** HAP services to prevent homelessness, **the Request for Assistance workflow should not be completed.** In this situation, the EA HAP Application form (EA-3) (Attachment A) is completed to collect the necessary information for determining the applicant financially eligible for HAP services. Upon completion of the EA-3 form, a referral to the HAP provider is appropriate. Complete and send the Referral to Housing Assistance Program Services (RHAPS) to the HAP provider. Receipt of HAP services will not jeopardize future receipt of EA shelter benefits if the applicant cooperates with the HAP provider.

**Hotel/Motel  
SSPS Invoices**

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There are two significant changes that impact hotel/motel SSPS invoices.

- When completing an SSPS invoice for hotel/motel placement, you must enter the unique vendor number for the particular hotel/motel in block 47 on the SSPS invoice. Each hotel/motel has a unique vendor number. The hotel/motel vendor numbers are found on SSPS. Go to the *SSPS Inquiry Menu*, select Name Browse by Vendor Inquiries, and enter the name of the hotel/motel. Enter the hotel/motel name on the *SSPS – Vendor Inquiry Browser Select* screen. The *SSPS – Vendor Inquiry Browser* screen appears. Scroll down the screen to find the specific hotel/motel with its seven-digit vendor number. See the *SSPS User’s Guide, Volume 3, Chapter II: Data Entry and Retrieval* for additional information.

The SSPS invoice is sent to CSN not the hotel/motel.

- An AU Manager may void or adjust the SSPS invoice for a hotel/motel as long as the void or adjustment occurs within the same calendar month that the SSPS invoice was issued. This change allows AU Managers to correct an invoice when the EA AU’s placement at the hotel/motel was cancelled for a particular day. **Do not adjust the SSPS invoice if the hotel/motel is owed for that night’s stay.**

**Voiding or making an adjustment to an invoice after the current month can only be done by Central Office.**

**Questions**

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

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TAO Address

Application for Housing Assistance Services

Name \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State/ZIP \_\_\_\_\_

I am requesting Housing Assistance Services to prevent homelessness.

I hereby attest that the following facts are true:

- I have a child in my household who is under 21 years of age.
- I am related to this child as the parent, sibling or caretaker relative.
- A total of \_\_\_\_\_ people are in my household and are related to the child.
- The combined assets of everyone in my household are under \$2,500.
- The total monthly income, including earned and unearned income, of everyone in my household is \$\_\_\_\_\_.

I certify under penalty of perjury that the information given in this application is true to the best of my knowledge. By signing this form, I give permission to the Department of Transitional Assistance to contact local and/or regional housing agencies, authorities and private agencies to share information that is necessary for me to get housing assistance services.

\_\_\_\_\_  
Applicant's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
AU Manager's Signature

\_\_\_\_\_  
Date