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Field Operations Memo 2004-32
August 9, 2004

To: **Transitional Assistance Office Staff**

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

Re: **EOHHS Virtual Gateway Food Stamp Application**

Overview

The Executive Office of Health and Human Services (EOHHS) is committed to improving access to programs and increasing the efficiency, quality and consistency of services. The *Online Virtual Gateway* to EOHHS programs and services is one way to achieve these goals. In August, consumers and service providers will have a new means by which they can conduct business with EOHHS. Although it is new and innovative, it will not change EOHHS programs or delivery. EOHHS administrative and support processes will be minimally affected. It is important to remember that these online tools will complement, not replace, current methods for interacting with our applicants and recipients.

Beginning August 16, 2004, the online tools and information will be available from the EOHHS web page at the Commonwealth of Massachusetts' website, *www.mass.gov*. The first online tools to be made available will be:

- A *Catalog* containing descriptions of EOHHS programs and services;

- An *Eligibility Screening Tool* that can be used to determine potential eligibility for EOHHS programs and services; and

- The *Common Intake Data Collection Form* which allows providers to collect information from a client on one online form to assist in the application for multiple EOHHS programs and services.

The Catalog Feature

The *Catalog* feature will provide program descriptions and information about how to obtain the described services for the seven pilot EOHHS programs. The online tools will be available for the following EOHHS programs:

- MassHealth
    - Children's Medical Security Plan
    - Healthy Start
- Child Care
- Food Stamp Benefits
- WIC
- Women's Health Network
- Substance Abuse (Catalog and Eligibility Screening only)
- Early Intervention (Catalog only)

The Eligibility Screening Tool

The *Eligibility Screening Tool* allows individuals and families to obtain an anonymous review of potential eligibility for one or more of the seven programs currently included in the Virtual Gateway. Using a personal computer with internet access, an individual can access the EOHHS website at *www.mass.gov*, select the programs he or she is interested in and answer a series of general questions about household size and composition, income and assets. Based on the information provided, Virtual Gateway will return a response of "may qualify" or "does not appear to qualify". The response is clear that it is not a formal determination of eligibility and informs the individual how to proceed if they would like to formally apply for a program.

The Common Intake Data Collection Form

The *Common Intake Data Collection Form* will allow providers to collect information from a client on one online form to assist in the application for multiple EOHHS programs and services.

The Common Intake Data Collection Form collects data for the food stamp application and will be available to selected providers at four pilot sites. The pilot sites are:

- Massachusetts General Hospital, Boston
- St. Francis Day Shelter, Boston
- Joseph Smith Community Health Center, Allston
- Community Care for Kids, Quincy Community Action Agency, Quincy.

Applicants at the pilot sites may apply for one or more of the EOHHS programs currently included in the Virtual Gateway. Only the applications of those who choose to apply for food stamp benefits will be forwarded to DTA.

Information About the Virtual Gateway FS Application

The Virtual Gateway FS Application

The *Virtual Gateway* Food Stamp Application is yet another way to apply for food stamp benefits. Like the Project Bread Web application, the Virtual Gateway FS Application was designed to be "user friendly." The questions asked include both the BEACON RFA and BEACON Q&A navigators.

Food stamp applications received through the Internet are actual food stamp applications. *Virtual Gateway FS Applications are subject to standard food stamp application processing timeframes*: Seven days for expedited; thirty days for non-expedited applications. All Virtual Gateway FS Applications must be screened for expedited service. It is the obligation of the AU Manager to determine expedited food stamp eligibility. This remains true even though the expedited screening questions are asked on the Virtual Gateway FS Application.

Just like the simplified food stamp application, the applicant can choose to complete all or part of the application. The minimal requirements for submission are slightly different for a web applicant. These include: name, address*, date of birth*, *gender*, and an *"electronic signature*." **The grantee's decision to hit the "submit" button on the Virtual Gateway FS Application constitutes a signature for purposes of setting the food stamp benefit start date.**

Virtual Gateway FS Applications submitted to DTA on or before 5:00 pm on a business day will have an application start date on BEACON of that day. Virtual Gateway FS Applications submitted to DTA after 5:00 pm on a business day, or on a weekend or holiday will have an application start date on BEACON of the next business day.

 Note: Virtual Gateway FS Applications are "*real time*" applications. This means that a Virtual Gateway FS Application can appear on the Web Application view at any time during the day.

Information collected on the Virtual Gateway FS Application is known as "*web data*." Web data will not become part of BEACON until the appropriate TAO staff person has completed the Web Application workflow and decides to commit the web data on to BEACON. Therefore, Virtual Gateway FS applicants will not be found on the Client List until each person is name-cleared and the AU's address is validated/matched.

Because the MA Virtual Gateway was designed to capture information for multiple programs, the questions that populate the common data collection form will vary based on the program(s) being applied for. Similarly all questions answered on the MA Virtual Gateway application will not come over to BEACON as part of the food stamp application because it may be irrelevant or too vague for food stamp purposes.

Information About the Virtual Gateway FS Application

The Virtual Gateway FS Application (Continued)

Finally, like any other applicant, the Virtual Gateway grantee must complete the application process. This includes being interviewed (by telephone or in person), submitting all required verifications and returning a signed RR/FSP-1B (telephone interviews only) before food stamp benefits can be approved or denied. When the Virtual FS Gateway application is submitted, the applicant is given an informational sheet which explains these requirements to them.

Receiving a Virtual Gateway FS Application

The TAO Web Application Liaison

Each TAO must designate one or more Web Application Liaisons, complete an SCR-1 for each web liaison and forward the completed SCR-1 to the appropriate Regional Director.

The Web Application Liaison is informed of the TAO's Virtual Gateway FS Applications through the Office Explorer, Daily Priority Actions, Web Applications view. Web Liaisons must check their Web Views periodically to see if applications have been received.

It is the responsibility of the TAO Web Application Liaison to assign Virtual Gateway FS Applications to designated AU Managers. To assign a Virtual Gateway FS application, the TAO Web Liaison must:

- Go to TAO Office Explorer, Daily Priority Actions;
- Click on Web Applications View and highlight the AU to be assigned;
- Click on Tools from the Menu Bar;
- Select Assign Web Application from the dropdown options;
- Select the AU Manager from the Dropdown list for that TAO; and
- Click on Save and OK.

Once the web application is assigned, the AU will appear on the AU Manager's Web Applications view. The Web Applications view contains the following information for each web application.

Grantee: Name of applicant.

SSN: SSN of applicant (if available)

Program: FS or Expedited FS

Note: Virtual Gateway FS Applications will be identified as Expedited FS if *Yes* is answered to any of the expedited service screening questions. FS AUs are subject to the seven-day expedited processing timeframe.

Received: The BEACON application start date based on the date/time the Web application was submitted by the applicant.

Submitted: The date the Web application was submitted.

Web ID: Virtual Gateway assigned confirmation number for Web applications.

Receiving a Virtual Gateway FS Application

The TAO Virtual Gateway FS Application Liaison (Continued)

A TAO Web Liaison may elect to complete the Web Application workflow before assigning the AU. Once the Web Application workflow is completed, the application will appear on BEACON as if a Request for Assistance was completed for a food stamp application. The AU will be converted to a Pending AU and will be displayed on the Daily Priority Actions, Pending Applications/Reinstatement view. The Pending Applications/Reinstatement view will identify the Source of the Application as *MA Virtual Gateway*.

The Web Application Data Sheet

The Web Application Data Sheet contains information collected on the Web application. Once a Virtual Gateway FS Application is submitted, the TAO Web Liaison will be able to view and print the Web Application Data Sheet locally by following these steps:

- Go to TAO Office Explorer, Daily Priority Actions;
- Click on Web Application View and highlight the AU whose Web Application Data Sheet you wish to view/print;
- Click on Tools from the Title Bar and select View Documents from the dropdown list to view the Web Application Data Sheet; and
- Print the Web Application Data Sheet for reference when completing the Web Application workflow.

The Web Application Data Sheet:
- Identifies the source of the application as MA Virtual Gateway.
- Indicates which questions were answered with a *Yes* or *No*, and those not answered at all.
- Will be used as a reference tool by the TAO Web Application Liaison or the AU Manager during the Name Clearance/Address Match process of the Web Application workflow to resolve any match issues.
- Will be used as a key information document for those Eligibility Explorer windows that were not automatically updated with Web data. For Example: *New Applicant, Matched Address.* If the address on the application is matched to an existing household, the household merge process will be invoked. A pop-up message will be displayed: "Since the household contains present members who were not included in the Web application, no additional Web data will populate any additional interview windows." If the household members not listed on the Web application are added at this time, no additional Web data will populate any Interview windows for any of the Assessed Persons on the Virtual Gateway FS Application. The AU Manager must press *Yes* to continue, or press *No* to make changes to the household using the Web Application Data Sheet and a contact with the client, if necessary.

Receiving a Virtual Gateway FS Application

The Web Application Data Sheet (Continued)

- Is permanently created, stored in Document History and associated with the APID of the grantee after the Match Summary window is completed and saved. The Web Application Data Sheet is a form identified in Document History as Web Application.

The BEACON Web Application Workflow

From the Web Applications view, the AU Manager must select the Virtual Gateway FS Application to be worked on. This will bring up the Interview Selection List window. Click on Web Application to access the Web Application workflow within the Eligibility Explorer, which contains four windows.

1) Web Applications/Assessed Person/Grantee Window
   The purpose of this window is to display the Web data necessary to complete the Name Clearance process for the grantee. The name, date of birth and gender of the applicant are required entries on the Web application and will be populated when this window is first displayed. The Social Security Number is displayed, if provided. The remaining fields on the window are not available at this time and will be updated in the AU Composition, Assessed Person window. If the person was not known to BEACON, the Web data will be displayed. If the person was matched to an existing BEACON Assessed Person, the information on BEACON will be displayed. The AU Manager must later reconcile the BEACON data using information displayed on the Web Application Data Sheet.

2) Web Applications Address Window
   The purpose of this window is to display the Web data necessary to complete the address validation and address match processes. The applicant's address, address type, housing type, and homeless indicator (if only a mailing address has been provided) are required entries on the Web application. Procedurally, the function of this window has not changed.

3) Web Applications/Additional Person Window
   The purpose of this window is to display the web data necessary to complete the Name Clearance process for the other household members. (The grantee is Name Cleared in the first window of the Web Application workflow.)

   The window will be available when there is more than one person in the household. Name, date of birth and gender are the required entries for all household members on the web application and will be populated when this window is first displayed. Social Security number is displayed, if provided. The remaining fields on the window are not available at this time and will be updated in the AU Composition, Assessed Person window.

Receiving a Virtual Gateway FS Application

The BEACON Web Application Workflow (Continued)

If the person was not known to BEACON, the Web data will be displayed. If the person was matched to an existing BEACON Assessed Person, the information on BEACON will be displayed. The AU Manager must later reconcile the BEACON data using information displayed on the Web Application Data Sheet. This window will display a Member List that will include all household members except the grantee, whether they are applying or not. A new household member on the Member List, who is not applying, will appear after Name Clearance as a Basic person on the Household window. A matched household member on the Member List, who is not applying, will appear after Name Clearance as an Assessed Person on the Household window.

4) Web Applications/Match Summary Window
The purpose of this window is to display the results of each Assessed Person's Name Clearance process, and the results of the residential address match process before the information is committed to the BEACON database.

AU Managers must review the information summarized in this window and confirm the Results before the Web data is saved and committed to the database. The window will display the name of the grantee, and other AU member(s), date of birth, social security number (if available), Result(s) of the Name Clearance process and a Remove block. The Result of the Residential Address match is displayed in the bottom of the window, where it indicates whether the address is new or matched.

The AU Manager activity on this window is to:
- review the Results of the window;
- click on the Remove Button if an AU member; and
  Note: You cannot remove the grantee.
- click on Next or Finish to save the information.

Once the Match Summary window is Saved, BEACON will:
- automatically advance to the Web Application Data Sheet now stored in Document History;
- assign each applicant's APID to the database;
- assign the Residential and Mailing Address IDs to the database;
- calculate the FS application start date based on the Web application's submittal date and time;
- create a pending FS AU;
- generate a FS App Info Notice with brochures to be sent to the applicant through Schraffts; and
- enable the Household window and set it to Requires Reedit.

Receiving a Virtual Gateway FS Application

The BEACON Web Application Workflow (Continued)

Match Summary Edits

The Match Summary window will identify several edit conditions and give an associated edit message; this is a preventative step to help AU Managers accurately transfer a Virtual Gateway FS Application into the BEACON application workflow without duplication errors.

Completing the Virtual Gateway FS Application

Incorporating Web Data into the BEACON Workflow

Remember: The Web applications assigned to an AU Manager may be found in one of two places, the AU Manager's Web View or the AU Manager's Pending Applications/ Reinstatement view if the TAO Web Liaison completes the Web Application workflow before assigning the Virtual Gateway FS Application.

After the AU Manager completes the four windows of the BEACON Web application workflow, BEACON will automatically navigate to the Household Composition window which signals the start of the BEACON application workflow as if an RFA has already been completed. The **results/outcome** of the Household window determines which Web data is automatically displayed on each Interview window:

- New Applicant, New AU Members, New Address: All information contained on the Virtual Gateway FS Application will be updated for all new applicants with a new address. The Web data will be automatically displayed in the appropriate Interview window, when the window is first accessed.

- New Applicant, Matched Address: If the address on the Virtual Gateway FS Application was matched to an existing household, the household merge process will be invoked. A pop-up message will be displayed: "Since the household contains present members who were not included in the Web application, no additional Web data will populate any additional interview windows. If the household members not listed on the web application are added at this time, no additional Web data will populate any Interview windows for any of the Assessed Persons on the Web Application. Press *Yes* to continue, press *No* to make changes to the Household."

- AU Member Matched to an Existing Assessed Person: All information contained on the Virtual Gateway FS Application will be updated for all matched applicants with a new address, except non-name clearance Assessed Person data, pregnancy data, and FS parental control data. The Web data will be automatically displayed in the appropriate Interview window, when the window is first accessed.

Completing the Virtual Gateway FS Application

Incorporating Web Data into the BEACON Workflow (Continued)

This situation will occur when a grantee with an active or pending FS AU submits another application for the program and the AU Manager or TAO Web Liaison is trying to complete the four Web windows or attempting to complete the RFA in BEACON. **The Web as a source for food stamp applications may be particularly vulnerable to duplicate applications but each application must be dispositioned in BEACON.**

Denying a Duplicate FS Application

AU Managers must follow these procedures to deny an application that is matched to a grantee with a pending or active FS AU.

- On the Match Summary window:
  - remove all persons except the grantee; and
  - in response to the pop-up message that reads: *"The grantee already has a pending or active food stamp AU for the program; **you must be a director** to create an additional AU with an FMCS SSN starting with 998. Note:* "Once the AU Comp Results window is completed, this additional AU with a 998 SSN will be sent to FMCS unless an Interview Wrap-up Request with a Denial Reason for this AU is released on the same day, click OK."

- Close out of the Virtual Gateway FS Application for this client and ask the TAO Director to go into BEACON and complete the Virtual Gateway FS Application windows using his or her **"***sign-on"* security level.
  Note: This will bring the AU over into BEACON so the AU Manger can resume processing.

- On the Apply for Assistance window:
  - select the grantee for the newly created BEACON Pending AU and indicate that he or she is applying; and
  - click on *Update*.

- On the AU Composition Results window:
  - highlight and select the AU to be denied; and
  - select *Reason Category:* Program Rules, *Reason:* Currently in another FS AU; and
  - click on *Save*.
    Note: As you complete the AU Composition Results window, BEACON may require that you go back to the Assessed Person window and satisfy edits.

	Completing the Virtual Gateway FS Application

Incorporating Web Data into the BEACON Workflow (Continued)	• On the Interview Wrap-up window:
	  ◆ process the denial of the FS AU;
	  ◆ authorize the Request for the Supervisor's approval; and
	  ◆ the Supervisor must sign off on the Request to create a Pending Release transaction on the same day so that an additional AU with a 998 number is not created and sent to FMCS.
	  Warning: If the Supervisor does not authorize the denial to the level of Pending Release on the same day the duplicate AU is created in BEACON, a 998 AU will be set up in FMCS.

Incorporating Other Income Types

Additions have been made to the dropdown list of Other Income Types on BEACON to accommodate new income types coming over from the Virtual Gateway FS Application. Most of these income types will be listed on the Other Income window with the prefix *Web* but must be replaced with an original BEACON income type to facilitate matches and SDX updates. For example, a *Yes* answer to TAFDC income on the Virtual Gateway FS application will come over to BEACON as *Web TAFDC* on the Other Income window. Since BEACON is already programmed to automatically count TAFDC income in the food stamp calculation, the AU Manager must end Web TAFDC as a source of income following the instructions in the BEACON Income Type/Procedures column of the table below.

Virtual Gateway Income Type	**BEACON Income Type/Procedures**
Loan (Non Educational)	Noncountable for FS. On BEACON, choose "Exists" *No*. Do not enter a dollar amount.
Loan (Non Ed Lump Sum)	Noncountable for FS. On BEACON, choose "Exists" *No.* Do not enter a dollar amount.
Web Local Government Pension	On BEACON, choose "Exists" *No* for Web Local Government Pension. Enter as ***Employment Related Pension***, verify and enter dollar amount.
Web Private Pension	On BEACON, choose "Exists" *No* for Web Private Pension. Enter as ***Employment Related Pension***, verify and enter dollar amount.
Web State Pension	On BEACON, choose "Exists" *No* for Web State Pension. Enter as ***Employment Related Pension***, verify and enter dollar amount.
Web Other Pension	On BEACON, choose "Exists" *No* for Web Other Pension. Enter as ***Federal Civil Service Pension***, verify and enter dollar amount.
Web TAFDC	On BEACON, choose "Exists" *No* for Web TAFDC. Do not enter a dollar amount. The system automatically counts an active TAFDC grant in the FS benefit calculation

Completing the Virtual Gateway FS Application

**Incorporating
Web Data into
the BEACON
Workflow
(Continued)**

Incorporating
Other Income
Types

MA Virtual Gateway Income Type	BEACON Income Type/Procedures
Web EAEDC	On BEACON, choose "Exists" *No* for Web EAEDC. Do not enter a dollar amount. The system automatically counts an active EAEDC grant in the FS benefit calculation.
Web VA Aid and Attendance	Noncountable for FS. On BEACON, choose "Exists" *No*. Do not enter a dollar amount.
Web VA Benefits Pay Reduction	Noncountable for FS. On BEACON, choose "Exists" *No*. Do not enter a dollar amount.
Web VA Compensation	On BEACON, choose "Exists" *No* for Web VA Compensation. Enter as *VA Service Related or VA Non-Service Related* determined by the verification submitted by the client. Verify and enter a dollar amount.
Web VA Enhanced Benefits	Noncountable for FS. On BEACON, choose "Exists" *No*. Do not enter a dollar amount.
Web VA Household Benefits	Noncountable for FS. On BEACON, choose "Exists" *No*. Do not enter a dollar amount.
Web VA Pension	On BEACON, choose "Exists" *No* for Web VA Pension. Enter as *Military Pension*, verify and enter a dollar amount.
Web VA State/City Needs Based	On BEACON, choose "Exists" *No* for Web VA State/City Needs Based. Enter as *VA State*, verify and enter a dollar amount.

It is possible for an income type to be misrepresented on the application due to a misunderstanding of the MA Virtual Gateway income questions. Therefore, AU Managers must not translate the Other Income Type from the Virtual Gateway FS Application into a BEACON Other Income Type until the unearned income is verified by the applicant.

**AU Transfer
Issues**

AU Transfer issues associated with processing a Virtual Gateway FS Application will be identical to AU Transfer issues for food stamp applications that are not Web-based. For more information on AU Transfer, see *A User's Guide: Transitional Assistance Programs and BEACON,* Chapter XIX, Section B.

**Processing the
Virtual Gateway
FS Application**

After the Web application windows are completed, the AU Manager must conduct the interview and process the application in accordance with Field Operations Memo 2004-12.

Questions

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