

Transitions



A Publication of the Massachusetts Department of Transitional Assistance

this month in...

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From the Commissioner

Dear Fellow Employees,

As part of our effort to emphasize a "Housing First" model, DTA's Housing and Homeless Services Unit is revising the way in which we approach self-sufficiency planning with our homeless families. After seeking input from a number of concerned partners (currently and formerly homeless parents, shelter providers, and housing search providers, as well as homeless coordinators, assistance unit managers, supervisors and directors), the Self-Sufficiency Plan redesign is nearly complete and will be sent out to Transitional Assistance Offices (TAOs) this month.

The EA Self-Sufficiency Plan has and will continue to be a valuable tool for outlining the steps a homeless family needs to take in order to obtain permanent housing and achieve financial stability. The goals established within each newly revised Self-Sufficiency Plan are specific to each individual family and will evolve as each family moves closer to self-sufficiency. Families working together with assistance unit managers, homeless coordinators, housing placement specialists, and shelter case managers will identify goals and strategies for obtaining economic self-sufficiency. In this way, families can become more active participants in charting their future.

The new EA Self-Sufficiency Plan focuses on certain key areas by:

- gearing all activities towards finding and keeping safe, permanent housing;
- identifying any barriers to being re-housed as quickly as possible;
- outlining the steps necessary to eliminate these barriers;

- focusing on increasing a family's income through employment and other mainstream benefits in order to become self-supporting;
- establishing and reevaluating new goals as milestones are achieved; and
- measuring progress as steps in the EA Self-Sufficiency Plan are completed.

I have mentioned some of the upcoming changes associated with this process, but as with many important Department changes, the Training Unit has scheduled sessions addressing the finer details of this topic. Participants in the training sessions will include certain TAO staff, key shelter staff and housing placement specialists.

As Department employees, some of us work with homeless families more directly than others. Still, whether your job is providing food stamp benefits, cash assistance or job training/placement, all of us play a role in stabilizing the lives of the homeless in our Commonwealth. The revised EA Self-Sufficiency Plan is a blueprint for helping homeless families in a more coordinated way.

Thank you for doing all that you can in moving us closer to this longstanding goal.

Sincerely,



John Wagner, Commissioner



COMMUNICATION is the KEY

Quality Corner

This month we will discuss two errors. The first is related to unearned income while the second is related to the SUA.

Unearned Income

The recipient was a resident of a group home and according to a recertification completed by the group home representative in August 2006; the recipient received \$949 in SSI per month. The BEACON record showed that the recipient received \$949 in RSDI. QC determined that at the last recertification, the AU Manager mistakenly changed the income from RSDI to SSI and changed the amount to \$721.10 based on information from an old SDX screen print available in the case record. This caused an over issuance for the review month.

What's an AU Manager to Do?

Whenever there is conflicting information, the AU Manager must ask for additional verification. In this particular case, the AU Manager should have done a SVES inquiry on this recipient in an attempt to verify whether or not the recipient received both RSDI and SSI incomes. If the SVES inquiry did not verify the recipient's income as stated on the recertification form, then the AU Manager should have informed the group home

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representative of the discrepancy and should have requested verification of the SSI and RSDI incomes.

Note: Some adult residents of group homes receive RSDI under a parent's claim number. Without the correct claim number (SSN) the SVES inquiry may not reveal the recipient's RSDI income.

Verification would have shown that the recipient received RSDI income only.

SUA

At the time of the TAFDC/FS reopening, the application showed that the recipient paid for heating and cooling expenses. The recipient provided a Landlord Verification (LLV) and a gas bill to verify these expenses. However, the landlord

had checked off nonheating under the Utility Information section of the LLV, indicating that the recipient did not pay for heating or cooling expenses. In addition, the billing rate listed on the gas bill was R-1-- Residential Nonheating.

During the Quality Control review, the recipient wrote a statement attesting that she did not have an air conditioner and did not otherwise pay for cooling expenses. The AU Manager allowed the household the heating/cooling SUA of \$528 for the review month resulting in an overpayment error.

What's an AU Manager to Do?

The AU Manager could have prevented the error by carefully observing the information on the Landlord Verification and the gas bill. There was an obvious discrepancy between what the recipient had written on the application form and what the landlord recorded on the LLV. Whenever there is discrepant information, the AU Manager must request additional verification. In this particular case, the AU Manager had verification that the recipient did not pay for gas heat. After verifying whether or not the recipient paid for cooling expenses, the AU Manager would have been able to assign the correct SUA to the case.

For more details on Questionable or Contradictory Information, see 106 CMR 361.620 and 106 CMR 361.630.

From the Hotline

- Q.** A 65-year-old man is applying for TAFDC and food stamp benefits for himself and his grandchild. He has reported that he is in receipt of a reverse mortgage. What exactly is a reverse mortgage, and how should I consider this money when calculating the TAFDC grant and the food stamp benefit amount?
- A.** A reverse mortgage is a loan that enables homeowners aged 62 or older to draw money out of the equity in their home without creating a monthly payment obligation. There are typically no income or credit requirements to qualify. The reverse mortgage does not become payable until the senior homeowner no longer occupies the property as his primary residence.

Because the reverse mortgage is actually a loan, any income from this source is considered excluded income in the Food Stamp Program. Refer to 106 CMR 363.230 (E) for more details.

This money is also noncountable for TAFDC. Refer to 106 CMR 204.250(LL) for further details.

NOTE: Although this homeowner is not in receipt of EAEDC, the income is noncountable in the EAEDC Program as well. Refer to 106 CMR 321.250(II).

Q. A food stamp recipient recently moved out of her home due to a fire. She is currently staying with a friend and is paying this friend \$200 per month for rent. While she intends to return to her home, in the short run she cannot stay in her home because it is no longer inhabitable and requires repairs. Even though she is no longer living in her private residence, she is still responsible for her mortgage. Can I combine her rental payment along with her mortgage amount when determining her shelter deduction?

A. Yes. The calculated shelter deduction will not exceed \$417 per month (unless the individual is elderly or disabled), but you may combine both payments so that the individual can get the maximum allowable shelter deduction. In addition to your recipient's monthly rent, shelter expenses for a vacated home may be included in the shelter deduction if this individual intends to return to her home, any current occupants in the home are not claiming a shelter deduction for food stamp purposes and the home is not leased or rented during her absence. Refer to 106 CMR 364.400 (G) for more information on the shelter deduction in the Food Stamp Program.

Also, if this food stamp recipient is incurring a utility expense at both properties, only one SUA may be applied, whichever is highest. Refer to 106 CMR 364.400(G)(4) for more details.

From the Forms File

New Form

09-414-0307-05

FS-NOMI(3/2007)

Notice of Missed Interview

In response to USDA's Program Access Review findings and to be in full compliance with federal regulations, the Department has developed a Notice of Missed Interview for use in all TAOs. State Letter 1323 and Field Operations Memo 2007-16 transmit changes related

to the *Notice of Missed Interview*. The Spanish version is on the reverse side.

Revised Forms

25-170-0307-05

25-171-0307-05 (S)

FSA-1 (Rev. 3/2007)

Food Stamp Benefits Application

The ethnicity and race section of the Food Stamp Application (FSA-1) form has been revised to comply with new federal regulations that require state agencies to collect race and ethnicity data about recipients of benefits from federal programs. This data collection will provide the federal government with sufficient information to permit effective enforcement of Title VI of the Civil Rights Act of 1964, which prohibits discrimination on the basis of race, color and national origin in programs receiving federal financial assistance.

The Right to an Interpreter section that was inadvertently deleted from the last revision of the FS Application form has been restored.

09-250-0307-05

09-251-0307-05 (S)

RR-FSP-1B (Rev. 3/2007)

Your Rights, Responsibilities and Food Stamp Penalty Warning

The Rights Responsibilities/ Penalty Warning Page has been revised to update the Nondiscrimination Statement with the correct contact information for filing a complaint.

25-150-0307-05

TABA-1 (Rev. 3/2007)

Application for Transitional Assistance Benefits

The ethnicity and race section of the TABA-1 form has been revised to comply with new federal regulations that require state agencies to collect race and ethnicity data about recipients of benefits from federal programs. This data collection will provide the federal government with sufficient information to permit effective enforcement of Title VI of the Civil Rights Act of 1964, which prohibits discrimination on the basis of race, color and national origin in programs receiving federal financial assistance.

02-195-0307-05

TAFDC-4 (Rev. 3/2007)

Verification of Caring for the Disabled

The Verification of Caring for the Disabled form (TAFDC-4) has been revised to ensure that the Medical Providers filling out the form know 1) who they are filling it out for, 2) who they are filling it out about and 3) the person being cared for is disabled.

25-105-0307-05

25-106-0307-05(S)

BEA/CCA (Rev. 3/2007)

Child Care Referral Notice

This form has been revised by adding a *Race* field and replacing the *Ethnic Origin* field with *Ethnicity* and changing “Office of Child Care Services” to “Department of Early Education and Care.”

13-225-0307-05

EA-20-Mile-Decline (Rev.3/2007)

Declination of Transfer

The *Declination of Transfer* form is used when an EA family living in a shelter that is more than 20 miles from their home community has declined an offer for transfer. Refer to Field Operations Memo 2007-11 for more information.

The following form is now also available in Portuguese.

25-172-0307-05(P)

FSA-1 (3/2007)

Food Stamp Benefits Application

Temporary Emergency Shelter Placement - 20-Mile Rule Tracking Procedures

EA

Field Operations Memo 2007-11

This memo obsoletes Field Operations Memo 2005-35 and informs TAO staff about:

- the new role of Housing and Homeless Services (H&HS) Centralized Placement Unit (CPU) in notifying an EA family whose placement is beyond the 20-mile limit about an available shelter placement and notifying the TAO of the EA family’s decision; and
- the revised *Declination of Transfer* form.

The memo also describes the TAO’s role in accurately reporting EA families who must be considered for a transfer to another shelter that is within 20 miles of their home community.

TAFDC - ESP: Pre-Worksite Training and Supported Work

TAFDC

Field Operations Memo 2007-12

The Supported Work Component has two associated activities on BEACON: “Pre-Worksite Training” and “Supported Work Services.” Both activities are offered by the same vendors in our TAOs.

Once the recipient completes the “Pre-Worksite Training” activity, the activity should be terminated and the recipient then enrolled in the “Supported Work Services” activity.

This Field Operations Memo tells TAO Staff about:

- a change to this procedure which will streamline referrals to Supported Work; and
- a change in procedures when a recipient gets an unsubsidized job during the initial three weeks of the activity.

TAFDC - Extension Approval Period Change

TAFDC

Field Operations Memo 2007-13

Field Operations Memo 2006-39 informed TAO staff that extensions granted for the activity of “Job Search/Job Readiness” would meet the two-month approval period. It also stated that for those recipients who were not “job ready,” a Vocational Evaluation had to be completed and that procedures for the Vocational Evaluation and for approving those extensions would be issued.

This Field Operations Memo gives TAO staff procedures for:

- approving extensions when a Vocational Evaluation must be completed; and
- changing the approval period for recipients employed full time.

It also provides a quick reference chart for extension approval period guidelines and their corresponding activities.

“The man who keeps busy helping the man below him won’t have time to envy the man above him.”

Henrietta Mears

TAFDC - ESP: Vocational Rehabilitation Services Referral and Elimination of Welfare to Work Component/Activity on BEACON

TAFDC

Field Operations Memo
2007-14

Field Operations Memo 2006-29 instructed TAO staff how to make referrals to the Vocational Rehabilitation Services activity because this activity was not initially listed on the ESP Component Eligibility window on BEACON.

Field Operations Memo 2007-14 tells TAO staff that, effective with BEACON Increment 2.1.22, scheduled for April 2, 2007, these instructions are no longer valid. The activity will appear on the ESP Component Eligibility window without clicking on the “Re-Assess” button.



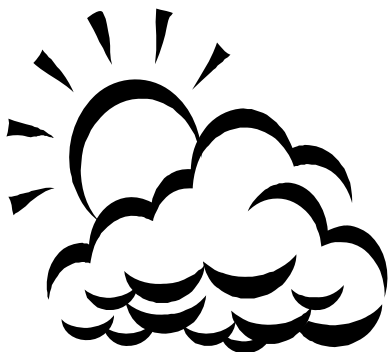
TAFDC - Health Insurance Offered Question on BEACON

TAFDC
Field Operations Memo
2007-15

Currently on the Employer Details window (accessed by clicking on the Employer Pop-up box on the Employment Status window), the “Health Insurance Offered” Yes/No radio button is grayed out for TAFDC recipients. The button is only accessible if a TAFDC applicant reports a new job.

Effective with BEACON Increment 2.1.22, scheduled for April 2, 2007, the “Health Insurance Offered” Yes/No radio button will be enabled also for all TAFDC recipients who get a job. This change is being made so the Department can more accurately report employment information.

This Field Operations Memo gives TAO staff procedures for answering the “Health Insurance Offered” question.



The BEACON-Generated Food Stamp Application Appointment Letters and the Food Stamp Notice of Missed Interview

FS
Field Operations Memo 2007-16
State Letter 1323

In response to USDA's Program Access Review findings and to be in full compliance with federal regulations, the Department has developed a Notice of Missed Interview for use in all TAOs. State Letter 1323 and Field Operations Memo 2007-16 transmit changes related to the Notice of Missed Interview.

The Field Operations Memo provides AU Manager instructions for:

- sending the BEACON-generated Food Stamp Application Appointment Letters;
- sending the BEACON-generated Food Stamp Notice of Missed Interview; and
- scheduling an Appointment Interview after Day 30.

TAFDC: Child Care Referral Notice and Procedural Changes

TAFDC
Field Operations Memo 2007-17

DTA and the Department of Early Education and Care (EEC) have agreed to changes to the child care referral process. The system-generated *Child Care Referral* notice and the paper form, BEA/CCA, have been revised to reflect the procedural changes.

The *Child Care Referral* notice and BEA/CCA form also now reflect changes to recording race and ethnicity implemented with BEACON Increment 2.1.22, scheduled for April 2, 2007.

This Field Operations Memo describes the changes to the child care referral process and informs AU Managers about text and information changes to reflect the new procedures.

APRIL

Revised Ethnicity and Race Data Collection

All

Field Operations Memo 2007-18
Beacon User's Guide Update 073

New federal regulations require state agencies to collect ethnicity and race data about recipients of benefits from federal programs. The purpose of this data collection is to provide the federal government with sufficient information to permit effective enforcement of Title VI of the Civil Rights Act of 1964, which prohibits discrimination on the basis of race, color and national origin in programs receiving federal financial assistance.

This Field Operations Memo:

- describes changes to BEACON windows to accommodate the new federal requirements; and
- provides procedures to be followed to collect ethnicity and race data using the new standards.

BEACON User's Guide Update 073 revises Chapter VI, Section C to include the new standards and to update the listing of languages available for selection in BEACON.

Verification of Dependent Care Expenses

All

Field Operations Memo 2007-19

In an effort to streamline food stamp application and verification processing and maximize food stamp benefit amounts for families, the Department no longer requires verification of dependent care expenses claimed by a food stamp applicant or recipient, unless questionable. This Field Operations Memo:

- identifies acceptable dependent care expenses;
- explains that self-declaration shall be a signed statement by the applicant or recipient;
- provides examples of dependent care expenses that may be considered questionable; and
- describes procedures for entry of dependent care expenses in BEACON.

TAFDC and EAEDC policies and procedures regarding verification of dependent care expenses are unchanged.

TAFDC - BEACON Work Program (WP) Participation Tab

TAFDC

Field Operations Memo
2007-20

Field Operations Memo 2007-7 told TAO staff about the Participation Actuate Report.

Effective with BEACON Increment 2.1.22, to ensure that TAO staff are better able to track TAFDC Work Program participation, a Participation Summary tab (entitled "WP Participation") has been added to the Summary tab on the Eligibility Explorer window.

This Field Operations Memo provides TAO staff with a description of the WP Participation tab information on BEACON. Attachment A shows the WP Participation tab as it will appear on BEACON.

Community Service and the Automation of the Fair Labor Standards Act (FLSA) Calculation

TAFDC

Field Operations Memo
2007-21

This Field Operations Memo informs TAO Staff:

- that, effective with BEACON Increment 2.1.22 scheduled for April

2, 2007, the FLSA calculations will be automated;

- where the FLSA calculation appears in BEACON; and
- that the icon entitled FLSA_CALC2 on the desktop is no longer necessary.

In addition, Field Operations Memo 2006-46: *TAFDC - Community Service and the Fair Labor Standards Act (FLSA) and Special Project*, is obsolete.

The BEACON-Generated Verification Checklist

All
Field Operations Memo
2007-22

The BEACON-generated Verification Checklist (VC-1) has been revised with the deployment of BEACON Increment 2.1.22 on April 2, 2007. It is intended for use with all DTA programs.

This Field Operations Memo:

- describes the changes represented on the revised BEACON-generated checklist;
- transmits the revised BEACON-generated Verification checklist, the INT-1 and INT-2 notices; and

- issues AU Manager procedures for using the verification checklist.

Bay State CAP Enhancements

FS
Field Operations Memo 2007-23

The Bay State Combined Application Project Demonstration (Bay State CAP) has been a very successful initiative for DTA. At conversion, 15,000 ongoing FS recipients received higher benefits and as a result of outreach efforts 40,000 individuals were enrolled in Bay State CAP.

However, after 18 months operating Bay State CAP, some deficiencies were identified and some enhancement recommended. A workgroup was formed to resolve issues and ease administrative burdens. As part of BEACON Increment 2.1.22, scheduled for April 2, 2007, the following changes will be effective:

- certain elderly individuals will receive Bay State CAP benefits sooner;
- SSI recipients who close for less than 30 days will not have Bay State CAP benefits closed or switched to regular FS;
- designated DTA staff will be allowed to reinstate Bay State CAP benefits in limited situations;
- the Bay State CAP calculation will be modified;
- Bay State CAP AUs will not appear on income match views or reports;
- the Shelter Code entered by SSA will now appear on the SDX; and
- notices to clients were modified to clarify responsibilities.

This Field Operations Memo discusses the enhancement changes and transmit procedural information where applicable. Many of the changes are automated and will require no AU Manager intervention.



Medex Premium Rate Changes

FS

Field Operations Memo 2007-24

Blue Cross and Blue Shield of Massachusetts has announced Medex premium rate changes to the following non-group plans: Basic, Bronze, Core, Core Plus, Gold, Silver, and Standard. These changes were effective on March 15, 2007.

This Field Operations Memo:

- identifies the non-group plans that have changed and the corresponding rate changes;
- provides information on updates to food stamp benefits and the Medex premium amounts; and
- transmits information about the 2007 Medex Premium Rate Change Report.

Impact of MassHealth Citizenship Rules on TAFDC, EAEDC and FS

TAFDC, EAEDC and FS

Field Operations Memo 2007-25

This Field Operations Memo informs TAO staff of changes that take place effective with BEACON Increment 2.1.22, scheduled for April 2, 2007. These include:

- the list of citizenship verifications in the Verified With window has been expanded to include all verifications acceptable to MassHealth;
- the MassHealth acceptable verifications have been labeled “Acceptable for MassHealth” to make them stand out;
- a new citizenship verification has been added to BEACON. It is called “TAFDC and/or Food Stamps Citizenship - Self-Declared - Not Questionable”; and
- the “Other” field for citizenship verification has been eliminated.

AU Managers should strongly encourage all TAFDC and EAEDC applicants to submit documents acceptable to MassHealth to verify citizenship, as described in this memo.

Beginning in April, more detailed citizenship verifications submitted by applicants will be forwarded to MassHealth in a data exchange. MassHealth may deny benefits to those recipients who cannot provide verifications recognized by MassHealth. Therefore, it is important to make sure that all applicants provide verifications that will be accepted by MassHealth.

Field Operations Memo 2007-10: *Citizenship Verification for MassHealth Eligibility for TAFDC and EAEDC Citizen Applicants* is now obsolete.



Random Moment Sampling Email - New Initiative

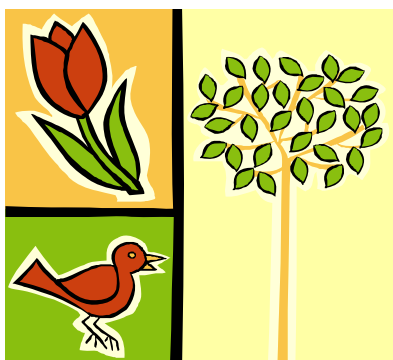
Beginning on April 1st, 2007, the Department will implement a Random Moment Sampling (RMS) initiative that will include testing a new email and web-based RMS survey process. The email and web-based system has a number of safeguards to keep information that it records secure. No confidentiality rules will be compromised by cooperating with this process.

This memo provides information about the RMS initiative and outlines the AU Manager(s) responsibilities.

FYI

BEACON Online Help Updates Issued in March 2007

BEACON Online Help Update Issue # 7 (03/20/07)



FYI

Food Stamp Medical Deductions Job Aid

The *Food Stamp Medical Deductions Job Aid* was designed to be a tool to assist AU Managers in identifying eligible medical expense deductions. This new job aid, developed by the Food Stamp Unit, is posted in Policy Online under the Job Aids heading.

Verified medical expenses that exceed \$35 a month are allowed for elderly and disabled applicants and recipients. Claiming medical expense deductions can increase the amount of food stamp benefits. Allowable expenses include not only prescriptions and doctor office visits, but many other medical expenses, such as over-the-counter medications, hearing aids, eyeglasses, dentures, sickroom equipment, health insurance and hospitalization policy premiums, and more.

AU Managers must make every effort to explore possible medical expense deductions with their elderly and disabled clients to maximize food stamp benefits for this most vulnerable group. AU Managers must also assist applicants and recipients in obtaining the necessary verifications of these deductions, if they are having difficulty or request assistance.

