


JANE SWIFT  
Governor

**Commonwealth of Massachusetts**  
*Executive Office of Health and Human Services*  
**Department of Transitional Assistance**  
600 Washington Street • Boston, MA 02111

ROBERT P. GITTENS  
Secretary

JOHN A. WAGNER  
Commissioner

Field Operations Memo 2002-10  
May 1, 2002

**To:** Transitional Assistance Office Staff  
**From:**  Cescia Derderian, Assistant Commissioner for Field Operations  
**Re:** Federal Veterans' Match

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**Introduction**

The Federal Veterans' Administration Match Report identifies assessed persons who may be receiving federal veterans' benefits and benefits from the Department of Transitional Assistance. This report will be run quarterly.

This memo provides information and instructions for reviewing and acting on matched data.

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**AU Manager Responsibilities**

When a match occurs, the AU Manager must review the information to verify whether the assessed person is open or closed on BEACON.

*If the assessed person(s) status is closed on BEACON, AU Managers must:*

- annotate the Federal Veterans' Match Log (FVM-1) (Attachment A) with the date the AU closed.

*If the assessed person(s) status is open on BEACON, AU Managers must:*

- review the AU record for any documentation that shows the assessed person either receiving federal veterans' benefits or no longer receiving federal veterans' benefits.
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**Documentation**

If the AU record contains documentation that shows the assessed person is receiving federal veterans' benefits, the AU Manager must:

- verify that the appropriate federal veterans' benefit amount is reflected on BEACON; and
- complete and annotate the FVM-1 with the appropriate action.

If the AU record contains documentation that shows the assessed person is no longer receiving federal veterans' benefits, the AU Manager must:

- complete and annotate the FVM-1 with the appropriate action.
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**Verifying  
Documentation**

If the AU record does not contain documentation showing that the assessed person no longer receives federal veterans' benefits, the AU Manager must

- send a Federal Veterans' Match Appointment Letter (FVMAL) (Attachment B) to the assessed person scheduling an appointment for a reevaluation to verify the federal veterans' benefit amount.

When the federal veterans' benefit amount is verified, the AU Manager must:

- verify that the appropriate federal veterans' benefit amount is reflected on BEACON;
  - complete and annotate the FVM-1 with the appropriate action;
  - submit the FVM-1 to the Supervisor for review; and
  - complete the overpayment and recovery process on BEACON, if appropriate. See *A User's Guide: Transitional Assistance Programs and BEACON*, Chapter II, Section E for instructions.
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**Verifying  
Documentation  
(Continued)**

If the assessed person fails to submit the required verification(s), or fails to keep the scheduled appointment, the AU Manager must:

- access the AU Composition Results window, click on the Results Tab;
- close the AU with the appropriate Reason Category from the dropdown list. Possible Reason Categories are:
  - Fail to Submit the Required Verifications,
  - Failed to Keep Appointment for Review,
  - Fail to Keep Appointment to Discuss Computer Match, or
  - Failure to Verify Income and/or Assets.
- choose the appropriate Reason Category;
- complete and annotate the FVM-1 with the appropriate action;
- submit the FVM-1 to the Supervisor for review; and
- complete the recovery process on BEACON, if appropriate. See *A User's Guide: Transitional Assistance Programs and BEACON*, Chapter II, Section E for instructions.

See *A User's Guide: Transitional Assistance Programs and BEACON*, Chapter IX, AU Composition Results for more information.

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**TAO  
Management  
Responsibilities**

TAO management is responsible for:

- distributing the Federal Veterans' Match reports to each AU Manager;
  - compiling the annotated FVM-1; and
  - ensuring that the AU Manager has taken the appropriate actions.
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**TAO  
Management  
Responsibilities  
(Continued)**

The completed FVM-1 should be signed by the Director/designee and returned to Centralized Eligibility Operations no later than the end of the month following the month of distribution. Match logs should be faxed to:

Donald Johnson  
Centralized Eligibility Operations  
600 Washington Street  
Boston, MA 02111  
Fax Number 617-348-5479

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**Questions**

If you have any policy-or procedure-related questions, have your Hotline designee call the Policy Hotline at 617-348-8478.

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**Commonwealth of Massachusetts  
Department of Transitional Assistance**

**Federal Veterans' Match Log**

Local TAO \_\_\_\_\_

Run Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Centralized Eligibility Operations Fax (617) 348-5479

<b>Last Name</b>	<b>First</b>	<b>MI</b>	<b>Social Security Number</b>	<b>PROGRAM</b>	<b>CAN</b>	<b>AU Action</b>

**AU Action Taken Codes**

N = No action needed

C = Closed due to match information

B = BSI referral due to match information  
(use only with another code)

V = Income Type Corrected

I = Increased due to match information

D = Decreased due to match information

T = Terminated due to other information;  
specify closing reason



**TAO Address**

**Federal Veterans' Match Appointment Letter**

Name \_\_\_\_\_

Address \_\_\_\_\_

City & ZIP \_\_\_\_\_

Dear \_\_\_\_\_,

The Department of Transitional Assistance has received information from a computer match with the Department of Veterans' Affairs that you and/or a member of your household may be receiving Federal Veterans' benefits.

An appointment has been scheduled for you on \_\_\_\_\_ Day at \_\_\_\_\_ Time

at the above address. If you cannot come in at this time, call your worker immediately to set up a new time when you are able to meet.

The purpose of this appointment is to give you an opportunity to discuss our findings. If you have a closing letter from the other agency, or can obtain one before the appointment, please bring it with you. Failure to keep this appointment will result in your case being closed or reduced.

You will receive a separate notice if your benefits are to be stopped or reduced. Also, you have the right to appeal any action taken by the Department. The appeal form will be on the reverse side of the closing notice.

\_\_\_\_\_  
Signature of Worker

( ) \_\_\_\_\_  
Telephone Number