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Field Operations Memo 2007-23
March 30, 2007

To: Transitional Assistance Office Staff
From:  John Augeri, Assistant Commissioner for Field Operations
Re: Bay State CAP Enhancements

Background

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.

The DTA and Social Security Administration (SSA) partnership is a model for other states. Both agencies have worked hard to make it easy to apply for and simple to stay on Bay State CAP food assistance benefits.

However, after 18 months operating Bay State CAP, some deficiencies were identified and some enhancements recommended. A workgroup was formed to resolve issues and ease administrative burdens. As part of BEACON increment 2.1.22, scheduled for release 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 specified 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 be identified on SDX; *and*
- Notices to recipients will be modified to clarify responsibilities.

This Field Operations Memo will discuss the Bay State CAP enhancements and transmit procedures where applicable. Many of the changes are automated and will require no AU Manager intervention.

**Changes to
Processing for
Elder (Over Age
65) Applicants**

Due to procedural changes at SSA, elderly SSI applicants (*over age 65*) are given a preliminary status before going into a current payment status. These elders have met all eligibility requirements for SSI benefits and are in a preliminary status until the actual payment is made. This interim processing code has delayed Bay State CAP benefits to these elders in some instances. To ensure these elderly SSI applicants receive Bay State CAP benefits sooner, Bay State CAP eligibility criteria have been expanded to include this preliminary status code.

BEACON will now look for the preliminary status code (*E02*) along with other eligibility criteria **when there is no active or pending FS AU**. If eligible, the elder will receive Bay State CAP benefits the month following the entry of the preliminary status code. BEACON will use the *prequalified SSI amount* to calculate the initial Bay State CAP food assistance benefit. The *prequalified SSI amount* will appear on the Results screen in BEACON. The E02 code will appear on the SDX Inquiry Screen in BEACON.

No AU Manager action is required for this change.

**Automated
30- Day Look
Back for SSI
Closings**

Many SSI cases close for less than 30 days due to administrative issues. The recipient and SSA often resolve the problem quickly and there is no interruption in SSI benefits. However, Bay State CAP benefits are closed or switched to regular FS because SDX information is sent to BEACON *immediately*. This has caused confusion for recipients and staff of both agencies.

As part of this increment, Bay State CAP benefits will no longer be interrupted if an ongoing Bay State CAP recipient's SSI case is closed for less than 30 days. BEACON will only close or switch the Bay State CAP once the SSI case has been closed for 30 days.

The **closing** reasons impacted by this change include:

- SDX indicates that the recipient is an ineligible noncitizen.
 - SDX indicates that the recipient is a resident of a public or private institution.
 - SDX indicates that the recipient is no longer a Massachusetts resident.
 - SDX indicates that the recipient's whereabouts is unknown.
 - SDX indicates that the recipient did not cooperate with a fraud investigation.
 - SDX indicates that the recipient is receiving assistance in another state.
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**Automated
30- Day Look
Back for SSI
Closings
(Continued)**

The switch to regular FS reasons impacted by this change includes:

- Recipient no longer receives SSI for any administrative closing reason.
- SDX indicates that the recipient is a fleeing felon.
- Federal Living Arrangement Code on SDX is no longer A.
- State Living Arrangement Code on SDX is no longer A or B.
- Recipients has a Marital Status of Married
- Recipient is under age 18.

This is a positive change for staff and recipients. It will ease the administrative burden for both DTA and SSA staff. It will also make Bay State CAP less confusing for recipients.

No AU Manager action is required for this change.

**Reinstatement of
Bay State CAP
Benefits by DTA**

In specified circumstances, a former Bay State CAP AU may now be reinstated by DTA staff. Each TAO will have a designated *Bay State CAP AU Reinstator*, usually a Director or Assistant Director, who may reopen a **closed** Bay State CAP AU or a **former** Bay State CAP AU which **switched** to regular FS. The limited situations in which a closed or former Bay State CAP AU may be reopened by the Bay State CAP AU Reinstator include:

- A Bay State CAP AU closed for failure to cooperate with a QC review may be reopened using the Bay State CAP shelter information on BEACON or as updated by QC staff.
- A Bay State CAP AU closed or switched to regular FS and the recipient wins an appeal of the action, may be reopened based on appeal decision instructions.
- A Bay State CAP AU closed in error by the Disqualification Unit may be reopened using the shelter information on BEACON.
- A Bay State CAP AU closed or switched to regular FS due to TAO staff administrative error may be reopened using the shelter information on BEACON.

The *Bay State CAP AU Reinstator* may reopen a **closed** Bay State CAP AU or a **former** Bay State CAP AU which **switched** to regular FS by:

- Opening the Bay State CAP Request Window in Program Administration and clicking on the *Initiate* checkbox.
 - Based on shelter information, click on the high (\$450 or greater) or low (less than \$450) CAP shelter radio button.
 - Choose the appropriate reason for reopening the Bay State CAP AU from the drop down box: *Administrative Error; ADU Error; Appeal Decision; or Cooperated with QC Review.*
 - Click finish to complete the request.
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**Reinstatement
of Bay State CAP
Benefits by DTA
(Continued)**

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- If the AU is currently in receipt of SSI benefits, the Bay State CAP AU Reinstator will receive an edit stating: *The request has been submitted for batch processing.*
 - If the AU is currently in receipt of SSI benefits, the Bay State CAP AU Reinstator will receive an edit stating: *The request cannot be saved because the latest SDX data does not indicate current payment status.*

IMPORTANT: Once submitted for batch processing, BEACON will determine using Bay State CAP criteria whether the AU is eligible for Bay State CAP food assistance benefits. The next day the AU will either be approved or denied based on current SDX information. BEACON will generate a Bay State CAP Approval Notice or a Bay State CAP Denial Notice. If approved, BEACON will automatically enter the type of recertification (*CAP FS AU*) and the new three-year certification period.

It is the AU Manager's responsibility to calculate and issue supplemental benefits owed to the Bay State CAP AU, *if any*.

**Bay State CAP
Calculation
Change**

The Bay State CAP food assistance benefit amount will be compared to the regular FS benefit amount if an **ongoing** Bay State CAP recipient reports a deductible expense to DTA. BEACON will continue to pay the higher benefit amount whenever a comparison calculation is made.

If there is old shelter expense information on file, BEACON will overlay the old amount with the appropriate Bay State CAP shelter parameter (*either \$250 or \$450.*)

In situations where there is an income change only, BEACON will no longer perform a dual calculation.

Note: BEACON will continue to compare the calculated Bay State CAP food assistance benefit amount to the regular FS benefit amount, *if any*, as part of an **initial** Bay State CAP request.

No AU Manager action is required for this change.

**Removal of Bay
State CAP AUs
from Matches**

Bay State CAP AUs will no longer appear on the following match views or reports:

- DOR New Hire;
 - DOR Quarterly Earnings;
 - Unemployment Income; or
 - 40 Quarters.
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Removal of Bay State CAP AUs from Matches (Continued)

Match information will continue to show in a closed status on Match History for: DOR New Hire; DOR Quarterly Earnings; or Unemployment Income.

IMPORTANT: Outstanding alerts will be automatically closed and will appear in Match History.

No AU Manager action is required for this change.

Shelter Code Available on SDX

The high or low shelter code entered by SSA will now appear on SDX in BA on the D Screen. It will be identified as **SHEL**. The Shel indicators are: **Y** (High Shelter), **N** (Low Shelter) or **Blank** (Not Requested).

This is important information since DTA staff will be able to verify that Bay State CAP has in fact been requested by SSA.

Notice Changes

A variety of changes were made on Bay State CAP notices to clarify recipient responsibilities and which agency (*DTA or SSA*) to contact for more information on a particular change. These changes will help recipients to resolve issues quicker.

In addition, to assist the Malden Centralized SSI Office, AU Manager extensions were added to notices and there is now either a CAP or SSI identifier for returned mail handling purposes.

Note: A number of changes were put in production as part of the Social Security Administration COLA; the remaining changes will be made as part of this increment.

Questions

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