

# Transitions

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## this month in...

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## From the Commissioner

Dear Fellow Employees,

During June, I had the opportunity to visit the Greenfield and Holyoke offices to meet with staff and discuss BEACON. Like all of you, they have spent the past months working on BEACON pilot activities. Beginning in November, you were asked to spend concentrated periods focusing on specific aspects of the new system. The pilot activities were designed to expose you to all aspects of the system, to familiarize you with issues such as conversion benefit discrepancies which you will need to deal with when we go "live" and to increase your ability to utilize the system to accomplish your job. My conversations in Greenfield and Holyoke confirm that you have taken these activities very seriously and that you want the implementation of BEACON to be successful.

I am fully aware that integrating these pilot activities into your day-to-day work has presented a challenge. As with other things you have been asked to do, I did not begin the pilot activities lightly nor was I blind to the burdens they would place on you. But it was clear to me that implementing a system such as BEACON required the strongest possible commitment on the part of all staff and I made the decision to make that commitment. Your response has been outstanding. I had the opportunity to thank the Greenfield and Holyoke staff personally. My thanks to the rest of you in the other offices across the Commonwealth is no less sincere. You have again surpassed my expectations—and, frankly, I have high expectations.

This pilot period has had its share of frustrations and it is not over yet. Like you, I was not happy that we were unable to implement during June. But, like you, I want to implement the best possible

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## From the Hotline

- Q. A previously closed recipient is reapplying for assistance. Should the AU Manager authorize a replacement MassEBT card?
- A. If the applicant no longer has his or her MassEBT card, the AU Manager should authorize a replacement card. If the applicant still has the old MassEBT card, the AU Manager should have the applicant take the MassEBT card to the IIS operator. The IIS operator will complete a “balance inquiry” using the old card. This inquiry will determine whether: (a) the MassEBT card is still in an Active Status on the EBT system, (b) the magnetic strip is working properly, and (c) the applicant remembers the correct PIN associated with that MassEBT card.

If a new MassEBT card and/or PIN is issued, performing a balance inquiry will verify that: (a) the case and card were successfully added to the EBT system, (b) the PIN was properly selected, and (c) the magnetic strip works. This step will prevent possible repeat visits to the TAO by the recipient due to the recipient’s inability to access his or her benefits.

- Q. I have an applicant who lives with her boyfriend, their common child and her child by a previous relationship. She is requesting TAFDC for herself and her child by a previous relationship as there is a deprivation factor of continued absence. Her boyfriend works full time and is not applying for assistance for himself or their common child. Can the applicant and the child by a previous relationship qualify as an assistance unit of two?
- A. No. Since there is no TAFDC work history requirement or designation of a principal earner, the common child has a deprivation factor based on the unemployment of his mother. Since all siblings related by blood who are themselves dependent children must be in the same assistance unit, the common child must be included in the TAFDC application. Additionally, since the parent(s) of a dependent child must be included in the same TAFDC assistance unit as the dependent child(ren), the common child’s father must be included in the TAFDC application and his income must be used to determine eligibility for an assistance unit of four. See 106 CMR 204.305.



- Q. I have a woman who is employed and applying for TAFDC for her stepdaughter only. Both natural parents are absent from the home. How is her income counted?
- A. Her income is not counted since she is (a) not the natural or adoptive parent of the dependent child, (b) not the spouse of a parent living in the home, and (c) not requesting assistance for herself. However, if she chooses to be included in the assistance unit, her income and assets would be countable. See 106 CMR 204.210(D), 204.305, 204.310, and 204.320.

## FYI

### Change in Benefit Date for “0” SSN for First Cycle July

Cash benefits for the first cycle in July for recipients whose SSN ends in “0” will be available July 1, 2001 for recipients on EBT and July 2, 2001 for recipients on Direct Deposit. For those recipients who receive checks, checks will be mailed for delivery on July 2 or July 3, 2001.

These changes are being made because these benefits are paid from the Fiscal Year 2002 funds and that Fiscal Year begins on July 1, 2001.

# FYI

## Federal Income Tax Rebates

Starting this summer, federal income tax rebates will be issued to many taxpayers. The U.S. Treasury is still in the process of working out the details for these rebate payments. Although the process may change between now and the time the payments are made, we are issuing this reminder as to how to treat the tax rebates for program purposes.

## Food Stamp Program

Money received in the form of nonrecurring lump sum payments such as tax refunds or rebates is **noncountable income** in accordance with 106 CMR 363.230(I), but is **counted as an asset in the month received** in accordance with 106 CMR 363.130(E).

## TAFDC & EAEDC

For TAFDC and EAEDC, income tax refunds are not counted as income, but are considered a countable asset. See 106 CMR 204.120(I) and 106 CMR 321.120(I).

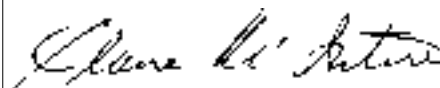
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system. This additional period of time allows us to review and resolve issues identified during the Integrated User Acceptance Test. It has also allowed me to make decisions which I believe will result in a smoother implementation.

Many of you have spoken to me or to your Implementation Manager about the complexities of the Household Merge process. I heard what you said, reviewed the process myself and decided to make it optional in many instances. Similarly, some expressed a desire to have the leeway to continue taking paper applications and to enter the information onto BEACON after the conclusion of the interview. Although I hope to move away from paper applications in time, I saw this as a reasonable request and have agreed to it. I have also instructed central office staff to continue to review how you receive information about BEACON and how we can better learn of and respond to your questions.

I am very much looking forward to the implementation of BEACON. That anticipation is heightened by the knowledge that your hard work and the time you have spent on pilot activities, the Integrated User Acceptance Test and the stress tests has resulted in a better system and in a staff well prepared to implement that system. Thank you.

Sincerely,



Claire McIntire  
Commissioner

## BEACON Today



Stay Informed!

## ***A User's Guide: Transitional Assistance Programs and BEACON Update 005***

### All

- The following change was made to Chapter I, Introduction:
  - Section E, Roles and Responsibilities, was added. This section defines the roles and their respective responsibilities that are assigned to various Department staff depending on their daily activities within a TAO or Central Office.
- The following changes were made to Chapter IV, Request for Assistance:
  - Section A, Processing the Request for Assistance, and Section B, Applications and Reapplications, were updated to reflect modified BEACON functionality; and
  - Section E, Caring for the Disabled, was added.
- The following change was made to Chapter V, Household Composition:
  - The procedures were updated to reflect the addition of the Address Change/AU Transfer section.
- The following changes were made to Chapter IX, AU Composition Results:
  - The procedures were updated to reflect modified BEACON functionality including Dever procedures; and
  - A chart of closing and denial reasons was added for easier reference.
- The following change was made to Chapter XVI, Program Administration:
  - Section A, the procedures were updated to reflect the addition of the Address Change/AU Transfer section.
- The following change was made to Chapter XVII, Interview Wrap-Up:
  - The procedures were updated to reflect modified BEACON functionality.

- The following changes were made to Chapter XIX, Case Maintenance:
  - Section B, Address Change/AU Transfer, was added; and
  - Section D, Sanctions, was added.
- Chapter XX, Glossary, was added.

## ***A User's Guide: Transitional Assistance Programs and BEACON Update 007***

### TAFDC

This update issues procedures for processing extension requests on BEACON. It incorporates changes made due to the *Smith v. McIntire lawsuit*.

## **BEACON Stress Test V**

### All Field Operations Memo 2001-27

This Field Operations Memo gave TAO Staff procedures to follow for the BEACON Stress Test held on June 13.

## **A User's Guide: Transitional Assistance Programs and BEACON Update 006**

### **TAFDC, EAEDC, FS**

This update contains revisions to the chapter on Disability:

- The sections on Documenting a Disability Determination on BEACON were revised by adding a new Referrals tab. Information on the AP/SSI-1 form and referrals to MRC were moved under this tab.
- The date the applicant or recipient signs the AP/SSI-1 form was added.
- Automated Mailing of Expired Medical Reports and Disability Supplements was added to the EAEDC section.
- Automated Mailing of Expired Disability Supplements was added to the TAFDC section.
- The term PRO (Professional Review Organization) replaced DES (Disability Evaluation Services) throughout the chapter.



## **Quality Corner**

Sometimes AU Managers do almost all aspects of a case correctly, but, in missing one small piece, make an omission that results in an error. The two cases this month involve problems with the Standard Utility Allowance (SUA) and the Low Income Home Energy Assistance Act (LIHEAA).

### **Shelter Proration**

In a recent TAFDC case the AU Manager did much of the case correctly. Seeing that proration was necessary, she correctly identified that there were two households and prorated the TAFDC income. She did not, however, take the final step in prorating the shelter costs by placing an “8” in Block 56. That would have prorated the shelter calculation, resulting in a correct payment.

### **What Can an AU Manager Do?**

Some of these cases are very complex. They involve multiple households, anticipating income, and correctly dividing the income and shelter costs, among other things. The activities must nonetheless be completed accurately, with the proper codes in the proper blocks. In this case the omission resulted in an error payment.

### **Low Income Home Energy Assistance Act**

At recertification in November, the AU Manager asked the recipient if she received fuel assistance the previous winter, recording that she had, but failed to follow up with whether she had applied or intended to apply for the current winter which would entitle her to the Heating SUA.

### **What Can an AU Manager Do?**

Receipt of LIHEAA allows recipients, even those without direct heating costs, to receive the Heating SUA. It must, however, be based on previous receipt of fuel assistance as well as application or intent to apply for assistance for the next year. Since this entitles the recipient to the much larger Heating SUA, it is an important to investigate it completely.

# From the Forms File

## New Forms

The following three forms are completed by the EA AU and all shelter and HAP staff associated with developing, assessing and monitoring the EA AU's plan for self-sufficiency. See Field Operations Memo 2001-28 for more information on the use of these forms.

*13-150-0601-05*

*13-151-0601-05 (S)*

*EA-Plan/PT 1 (6/2001)*

*EA Self-Sufficiency Plan - Phase II - Part 1*

*13-152-0601-05*

*13-153-0601-05 (S)*

*EA-Plan/PT 2 (6/2001)*

*EA Self-Sufficiency Plan - Phase II - Part 2*

*13-158-0601-05*

*13-162-0601-05 (S)*

*EA-Plan/PT 3 (6/2001)*

*EA Self-Sufficiency Plan - Phase II - Part 3*

## Revised Forms

Reminder: AU Managers are reminded to discard the old version of any revised form and use the new revised form. Before ordering new forms, survey your needs and order only the amount you can reasonably expect to use.

The following form has been revised to warn recipients that if found to have committed a cash program IPV at an Administrative Disqualification Hearing, in the absence of a Food Stamp Program IPV, they shall be ineligible to participate in the Food Stamp Program for the period required under the cash program rules. The Spanish version is on the reverse side.

*09-153-0601-05*

*FSP-1B (Rev. 6/2001)*

*Food Stamp Penalty Warning!*

The following three forms have been revised to include non-compliance language relating to the self-sufficiency plan.

*13-030-0601-05*

*EAN-1 (Rev. 6/2001)*

*EA Noncompliance Referral*

*13-040-0601-05*

*TES-WN-1 (Rev. 6/2001)*

*Warning Notice of Noncompliance*

*13-041-0601-05*

*TES-WN-2 (Rev. 6/2001)*

*Warning Notice of Noncompliance/  
Temporary Emergency Shelter  
Placement*

**The following forms are now available in Spanish.**

*02-158-0601-05*

*NFL-16 (S) (Rev. 6/2001)*

*Notice to Individuals Requesting  
Emergency Assistance Services*

*13-201-0601-05*

*HM-NT (S) (Rev. 6/2001)*

*Notice to Recipients of Emergency  
Assistance (EA) Staying in Hotels/  
Motels*

## Suspension of BEACON Release 2.0 Pre-Conversion Activities

## Obsolescence of Field Operations Memo 2001-26 A, BEACON Release 2.0 Pre-Conversion Procedures

All  
Field Operations Memo  
2001-26 B  
Field Operations Memo  
2001-26 C

These memos:

- Suspended BEACON pre-conversion activities due to the delay in BEACON implementation;
- Instructed TAO staff to continue to perform the activities described in Field Operations Memo 2001-21, *BEACON Release 2.0 Pilot Activities, Phase IV*, but allowed Directors to determine how much time each AU Manager would spend on these activities;
- Issued a modified case processing schedule for June 2001; and
- Obsoleted Field Operations Memo 2001-26 A, *BEACON Release 2.0 Pre-Conversion Procedures*.

## EA Self-Sufficiency Plan / Phase II

EA  
Field Operations Memo 2001-28  
*EA Reference Guide Update 007*

The memo and the update (specifically Chapter V) include procedures for completing the three-part *EA Self-Sufficiency Plan - Phase II (EA-Plan)* form with the adult members of the EA AU after placement in a congregate family shelter, scattered site shelter or a hotel or motel.

- The EA Self-Sufficiency Plan states what activities must be done while the EA AU is in a shelter.
- The EA Self-Sufficiency Plan consists of three parts:
  - Part 1 is completed by the AU Manager or Homeless Coordinator and the EA AU;
  - Part 2 is completed by the HAP provider and the EA AU; and
  - Part 3 is completed by the shelter (except for hotels or motels) and the EA AU.
- The EA Self-Sufficiency Plan should be completed during a joint meeting of the adult members in the EA AU, the HAP provider, the shelter provider (except for hotel or motels) and the AU Manager or Homeless Coordinator, but when a joint meeting is not appropriate, the AU Manager or Homeless Coordinator completes Part I and faxes it to the HAP and shelter providers for completion of their parts within the next 30 days. Upon completion, the parts are returned to the AU Manager or Homeless Coordinator who combines the three parts into one EA Self-Sufficiency Plan and faxes/sends the combined three-part EA Self-Sufficiency Plan to all parties.
- An EA AU, currently in a shelter placement, that refuses to develop the EA Self-Sufficiency Plan or to participate in the activities in the plan is noncompliant with the temporary emergency shelter requirements and the information is sent to the Noncompliance Committee.