

Transitions

November 2003
Vol. XVIII No. 10



A Publication of the Massachusetts Department of Transitional Assistance

this month in...

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From the Commissioner

Dear Fellow Employees,

As the month of November brings us closer to winter and the end of another year, it also brings an opportunity to reflect on recent events and achievements within our Department. By "taking stock" of our accomplishments as well as our challenges, we will be better equipped to formulate an agenda for the coming year.

Of course, our tight fiscal climate remains one of our most persistent challenges. Once again, I need to ask for your support and your ideas in finding new ways to do more with less. Just last month, we experienced the collective loss of 186 fellow employees through the Early Retirement Program. This news comes only 18 months after a similar program saw 272 employees leave our agency.

We greet this latest round of early retirements with mixed emotions. Without question, retirement is a time of celebration for those who, after years of hard work and dedication, are able to leave state service for new and different pursuits. Retirement is also a time for us to acknowledge the accomplishments of our former colleagues and express our sincere appreciation for their past efforts. With the most recent wave of early retirements, however, we are also forced to face the loss of institutional knowledge that their departure brings. Many of us realize that change in our agency is a constant and that, in the past, whenever a new policy, procedure or program was administered, we could count on our more senior staff to offer just the right amount of history, perspective and wisdom needed to guide us through the change.

Now, it is our turn. We need to begin providing this same perspective and wisdom. I am certain that those of us who remain

From the Hotline

Q. A recipient in our office on Direct Deposit recently submitted updated bank account information to us. The AU Manager went into the Liquid Assets window to update the account information. He found, however, that the new information was already there. How did BEACON obtain the change in bank account information?

A. Any time a change is initiated by a bank, the bank also notifies the Finance Unit at Central Office of changes in direct deposit bank account information. Once notified, the Finance Unit then makes the appropriate changes to the banking information on the Liquid Asset and Benefit Issuance Mechanism windows.

Q. If the Finance Unit is taking the action described in the answer above, should the AU Manager do anything to update the bank account information?

A. If the recipient submits the new bank account information to your TAO, the AU Manager, prior to taking any action, must review all bank information on the Benefit Issuance Mechanism window to ensure that the update has been made by the Finance Unit at Central Office. If the bank account information has been changed, the AU Manager should take no action. If the bank account information has not been changed, the AU Manager should proceed with the two-day process for updating direct deposit bank account information.

For more information on Direct Deposit and EBT procedures, refer to *A User's Guide*, Chapter XVI, Section C.

Q. I have a two-parent AU receiving TAFDC. The couple has a one-year-old baby. The father is a disabled grantee as described in 106 CMR 203.100(A)(1)(a). If the father is claiming an exemption from time-limited benefits, can the mother also claim an exemption because she is the parent of a child under the age of two as described in 106 CMR 203.100(A)(1)(d)?

A. As a member of a two-parent family, this mother would normally be unable to claim an exemption. The only way for her to claim an exemption as the parent of a child living in the home under the age of two is if the father provides medical documentation proving that his disability is so severe that he is unable to

provide care for this child. Refer to 106 CMR 203.100 (A)(3)(a). Also, remember that in a two-parent family, when one parent does not meet an exemption, the entire AU is considered nonexempt from time-limited benefits.

Q. Does the exemption status of the AU described above impact the work program requirement for these two parents?

A. Yes. As an exempt grantee, the father is not work program required. The mother is nonexempt and therefore she *is* work program required.



From

the

Hotline

FYI

BEACON Help Revisions

The following is a list of Help windows that have been added or revised within BEACON.

Links have been added to some of the “How To” procedure windows that will return the user to the specific main window. In the future, all “How To” windows will contain a link to the main window.

Added:

Process Standard Utility Allowance

Revised:

Add a New Asset
Add a New Related Benefit
Change Asset Information
Financial Holdings
Liquid Assets
Other Assets
Pensions
Real Property
Refunds
Standard Utility Allowance
Update an Existing Benefit
Vehicles

“Flatter me, and I may not believe you. Criticize me, and I may not like you. Ignore me, and I may not forgive you. Encourage me, and I will not forget you.”

William Arthur Ward

Continued from Page 1

possess similar talents and abilities. With a little humor and much hard work, we can move beyond the legacy of our former employees and continue to realize our agency’s goals. Our recent achievements are notable:

- We have increased our annual food stamp participation rate by nearly 26 percent.
- We are in the process of bringing an additional 20 percent of our TAFDC families into work- and training-related activities.
- Our ESP components have returned in new ways this year and will continue to offer recipients job choices and training opportunities.
- With the implementation of our business redesign initiative in Field Operations, we are implementing numerous changes to ensure even more efficient and accurate delivery of recipient services.

Over the next couple of months, our task will be to determine how best to build on these achievements in a very new environment. At the same time that we note the loss of recent retirees, we are also in the process of welcoming employees from a variety of other agencies. As a result of our continuing efforts at cost savings, state office space is shifting. Local Transitional Assistance offices will be sharing space with employees from the Office of Children, Youth and Family Services, of which our Department is a member. These people will include staff from the Department of Social Services (DSS), the Office of Child Care Services (OCCS), the Department of Youth Services (DYS), the Office of Refugees and Immigrants (ORI), and the Children’s Trust Fund. Our Department’s Central Office will be sharing space with personnel from OCCS as well as staff in the consolidated human resources functions of the Children, Youth and Family Cluster.

These co-location initiatives bring new opportunities for collaborative efforts between agencies. For example, with the co-location of the Office of Child Care Services, our TAFDC and food stamp recipients are poised to obtain more consistent and timely information on the child care services that will facilitate their job training and retention. As state employees, we can also benefit from these office moves and consolidations. As much as possible, we can

Continued on Page 5

Quality Corner

This month we will discuss three errors related to Monthly Reporting (MR) and Universal Semiannual Reporting (USAR). Each could have been prevented.

Prospective Budgeting and MR

A recipient had lost her job and reported it to her AU Manager. However, she had started a new job. Unfortunately, she reported her first two weeks' wages on a Monthly Report that she had submitted late. She did not report the new wages timely to her AU Manager. Because the Monthly Report was late, the wages were not entered on BEACON until two months later.

What Can an AU Manager Do?

Because the recipient started a new job, the wages should have been reported to the AU Manager within 10 days and then entered on BEACON. At that time, the initial wages should have been budgeted prospectively. See *A User's Guide: Transitional Assistance Programs and BEACON* Chapter XVI-F-1. If this had been done correctly, no error would have resulted.

In another case, the recipient brought in a letter that verified her earned income had terminated as of May 5th. Her budget month was from April 4th through May 3rd, and she reported one week of work for this period. The AU Manager did not use these wages because he considered this to be income from a terminated source in the budget month.

To disregard income from a terminated source on an MR AU, three things are necessary. First, the termination must be in the budget month. Second, the wages, when entered, must increase the TAFDC grant, and third, they must be timely reported. (106 CMR 366.110). In this AU, the recipient's earnings were so low that she had no deductions from her grant. Also, her income did not terminate in the budget month; she actually received another check in the month after the budget month for some hours worked in that month. Consequently, all her earnings would have been countable. This AU would have been correct if the AU Manager had followed the policy for terminated income.

Semiannual Reporting

A Universal Semiannual Reporting AU consisting of a mother and child was certified in December for six months. The mother receives Unemployment Compensation and child support income. The child support income was properly recorded and counted on the Other Income window, but the Unemployment Compensation was not properly recorded and consequently not counted in the food stamp calculation, resulting in an incorrect food stamp benefit amount.

What Can an AU Manager Do?

AU Managers must carefully answer all questions on the Income and Expense Q&A. A *Yes* answer to the Other Income question causes the Other Income window to require re-edit. This enables the AU Manager to enter detailed information about the income, enter the amount of income, and indicate whether or not this income is countable for cash and/or food stamp eligibility determination. In instances where the income type is not new to the AU, the AU Manager must select the income type from the record in the window, make the necessary

changes on the Source tab, enter the new amount on the Income tab, and click on Update. For more information on entering information on the Other Income window, see *A User's Guide: Transitional Assistance Programs and BEACON*, Chapter XIV-D.

In another AU that includes a mother and her children, all under age 3, the recipient reported working almost full-time but did not report any childcare expenses. The client, in fact, paid childcare expenses but forgot to report it.

What Can an AU Manager Do?

AU Managers must be careful to ask certain questions of recipients when it seems probable that a working recipient might be paying childcare expenses. Whereas some working parents do not pay for childcare expenses, many do. A recipient might forget to report childcare expenses but would be likely to report paying them if asked during an interview.



begin to engage in information exchanges with our new neighbors from other departments who are now joining us in our work spaces. A willingness to share knowledge on programs and services will likely be reciprocated. In this way, we can all truly gain from the experience.

In closing, it is apparent that the challenges we face present themselves along with unique opportunities. I am confident that together we can meet both with determination and professionalism.

Sincerely,

John Wagner, Commissioner



COMMUNICATION is the KEY

Delete Shelter Charge

EA

EA User's Guide: *Emergency Assistance, SSI Special Benefits and BEACON* - Update No. 016

This update revises EA procedures based on a Superior Court judge's temporary restraining order. The order mandated that the Department stop imposing the \$100-per-night charge to an EA AU who loses a shelter termination appeal after requesting that the Department continue their assistance pending their appeal. See Field Operations Memo 2003-29 for procedural details.



FYI

Changes to Policy Online

This month you will see the following changes to Policy Online:

FMCS Codes Window

- **Program Codes**

As a result of recent changes to the work program requirement, the definitions of Program Codes 2 and 5 have been revised. The phrase “age 2 to mandatory full-time school age” has been changed to “age 2 or older.” The definitions of Program Codes 6 and 7 have been eliminated.

The phrase “**eliminated 9/03**” follows the original definition of Program Codes 2, 5, 6 and 7; the phrase “**revised 9/03**” follows the revised definition of Program Codes 2 and 5.

Reference Documentation Window

- Region Number/TAO Number/TAO Name Listing
- Service Area Listing – City/Town
- Service Area Listing – TAO

The Centralized TAFDC – Quincy TAO has closed and relocated to the Fall River TAO. The new name is Centralized TAFDC – Fall River. The options listed above have been updated to reflect this change.

Verification of Actual Shelter and Utility Amounts for Homeless AUs

FS

State Letter 1265

At initial certification, assistance units in which all members are homeless and reside in the home of another must verify actual shelter and/or utility expenses greater than \$143 per month if they want to be eligible for the shelter deduction and the applicable Standard Utility Allowance.



FYI

Using the “APs Not Meeting Work Program Requirements” View

AU Managers are reminded to use the “APs Not Meeting Work Program Requirements” View to determine which clients must be called to the TAO to determine why they are not meeting the work program requirement.

This View is especially important now that the population of recipients who are work program required has increased significantly with the recent policy change. The policy change requires a nonexempt recipient to meet the work program requirement. See 106 CMR 203.400 (A)(2).

When reviewing recipients appearing on this View, AU Managers must ensure that clients are enrolled in appropriate ESP Components/Activities. An EDP must be completed (including an Attendance Plan) for the client to be removed from the View.



ESP Transportation Services

TAFDC
Field Operations Memo
2003-32
2003-32A

This memo transmits the following information:

- Transportation payments for participants using public transit are issued by DTA staff.
- Transportation payments for participants using any means other than public transit are referred to TransAction Associates.
- The total payment for allowable transportation cannot exceed \$60 per month of verified participation.
- Transportation services cannot last longer than 60 days beyond the end of the 24-month time-limited benefits.
- Field Operations Memo 2003-32 A informed TAO staff not to make referrals to TransAction Associates until further notice.



From the Forms File

Revised Forms

AU Managers must discard the old version of any form and use the new form.

17-300-1003-05

CVTR1 (Rev. 10/2003)

Access to Jobs Customer Verification and Jobs Transportation Request Form

This revised form now includes more information about the recipient's request for transportation services from the Access to Jobs Program. Refer to Field Operations Memo 2003-32 for information on the use of this form.

13-160-1003-05

EA-15 (Rev. 10/2003)

EA Self-Sufficiency Plan/Agreement – Phase I GOAL: To Obtain Permanent Housing

13-150-1003-05

EA-Plan/PT 1 (Rev. 10/2003)

EA Self-Sufficiency Plan – Phase II – Part 1

The EA-15 and EA-Plan/PT 1 have been revised by adding the requirement of resolving outstanding Massachusetts warrants or defaults. At application, the EA AU is advised that resolving outstanding Massachusetts warrants is a requirement. Also, as part of the Self-Sufficiency Plan, the EA AU is again reminded that outstanding Massachusetts warrants must be resolved. Spanish versions of both forms will soon be available.

The following form and brochure are now available in Spanish.

09-079-1103-05

FSP-INFO (S) (Rev. 11/2003)

How to Get Food Stamp Benefits Brochure

09-376-1103-05

FS-USR-2 (S) (Rev. 11/2003)

Universal Semiannual Reporting (USR) Income Guidelines Form

FYI

USDA Clarification Regarding Food Stamp Work Program Caretaker Exemption

The Food Stamp Household Composition Parent/Child rule requires a child (defined as under 22 years old) who lives with a natural, adoptive or stepparent to be in the same FS AU. Some children will be subject to the Food Stamp Work Program requirement since an AU member between the ages of 18 and 49 is Work Program required unless exempt.

USDA recently issued a clarification regarding the caretaker exemption at 106 CMR 362.320(B)(3). An AU member must be exempted from the Work Program rules if living with a sibling who is under the age of 18. For example, a child who is 20 years old, and lives with his parent(s) and younger brother, aged 12, is exempt from the Work Program rules. There is no need to show that the 20-year-old sibling has responsibility for the care of the younger brother.

Food Stamp Work Program regulations will be updated shortly to clarify this policy.

FYI

BEACON Today

The publication of *BEACON Today* is being suspended. These bulletins were originally published as a method of getting BEACON information to users quickly during BEACON development and implementation. Currently, there are other mechanisms for informing local offices when an Increment is being deployed or when there are problems with a Batch Job or an interface. These *MIS Customer Services Bulletins* are generated on an as needed basis. The last few *BEACON Today*s simply announced a new Increment and directed you to What's New in BEACON Help. For the future, when you receive an *MIS Customer Services Bulletin* announcing the installation of a new increment, go to Help in the new increment and read What's New. In the future, should immediate communication be required because of major BEACON development, the publication of *BEACON Today* will be reinstated.

FYI

Globe Santa Mailing

In early October, active TAFDC, EAEDC and FS recipients, who reside in the Globe Santa geographic area, received the "Holiday Gift Verification" letter to send with their letter requesting to participate in the Boston Globe/Globe Santa program. This verification letter lists the Globe Santa address, and the name, date of birth and gender of all children age 14 years or younger.

A second mailing is scheduled for early November for new cases approved after the first mailing.

Families requesting income verification for Globe Santa, who did not receive the letter should be referred to the Central Office Income Verification Unit at 1-800-632-8095.



EAEDC Elderly: Review for SSI Eligibility

EAEDC
Field Operations Memo
2003-30

This memo explains which EAEDC elderly noncitizen recipients must reapply for SSI, defines a specific group that must apply for SSI immediately and instructs AU Managers to assist in the SSI application process.

Certain EAEDC elderly recipients (age 65 or older) might now be eligible for and must reapply for SSI benefits because of a change in their noncitizen status or more up-to-date information on their work history. They were initially denied SSI because of their noncitizen status. Some of these recipients might also be disabled with a disability expected to last 12 months or more.

In addition to reducing Department costs, encouraging applicants/recipients to apply for and follow through with the SSI process ensures a greater cash benefit for the recipient once the SSI is approved.



FYI

EBT CARD NAMING AND DESIGN CONTEST

The Department and its contractor are undertaking a new initiative to redesign the EBT card. This effort is being done along with other changes in the BEACON/EBT system.

It is desirable that the design of the new card look more like other “debit cards,” that it not be so identifiable as a Public Assistance “debit card.” As part of our Nutrition, Access and Participation goals for the Food Stamp Program, we would like the card to look more friendly. The first step is to redesign and rename the card which is currently named MASS EBT.

In the effort to obtain a new name and new design, the Department has decided to sponsor an EBT naming and design contest. You are invited to submit your suggestion for the new name, the new design or both the new name and new design. The goal is to select a name that reflects the Commonwealth of Massachusetts, refers to nutrition and respects the privacy of the EBT participant.

Please submit your suggestion, along with your name and e-mail address, to one of the following mailboxes:

E-mail: **Policy.Unit@.state.ma.us**, or

Policy, Procedure and Program Management Unit

Fourth Floor

Department of Transitional Assistance

600 Washington Street,

Boston, Massachusetts 02111

Suggestions must be submitted by close of business on:

Monday, December 1, 2003.

The winner will be notified by:

Wednesday, December 31, 2003.

Good luck to all and thanks for your participation!

FYI

The Americans with Disabilities Act Accommodation Request Process

Field Operations Memo 2003-19 spoke about the Department's obligations to provide reasonable accommodation under the Americans with Disabilities Act (ADA) and provided a few examples of the ADA accommodation request. The following is another example of a possible ADA accommodation request.

A recipient who is requesting a TAFDC nonpresumptive disability needs the TAFDC Good Cause Medical Statement (TAFDC-GCMS) to be exempt from the work program requirement.

If the recipient states she is having trouble obtaining a certified TAFDC-GCMS, the AU Manager should advise her of her right to request an ADA accommodation. For example, under the request process, the TAO Accommodation Team may find that a credible statement from a social worker or counselor familiar with the recipient's condition is acceptable to temporarily excuse the person from meeting the work program requirement until the TAFDC-GCMS is signed by a competent medical authority.

Happy

Thanksgiving

from the staff of Policy, Procedure and Program

Management



November 2003

TAFDC – Correcting Inconsistent AU/AP Exempt/Nonexempt Information

TAFDC
Field Operations Memo
2003-31

An LOQC review found discrepancies in TAFDC AUs that need to be corrected. The discrepancies occur between an AP's Work Program Exempt/Nonexempt status and an AU's Exemption Status on the Work Program Requirements window.

This Field Operations Memo gives TAO staff instructions about:

- a report listing the discrepancies;
- how the discrepancies should be adjusted; and
- the impact these adjustments will have on the APs/AUs.

Fall