



*Commonwealth of Massachusetts
Executive Office of Health and Human Services
Department of Transitional Assistance*

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**Online Guide Transmittal 2015-65
November 20, 2015**

To: Department of Transitional Assistance Staff
From: *AOS* Anne O'Sullivan, Assistant Commissioner for Change Management
**Re: TAFDC – Termination of Monthly Reporting and Automation of TAFDC
Reevaluations**

Overview

Currently, clients with earned income are required to complete a Monthly Report (MR) to verify wages, hours worked and other household circumstances. Effective December 2015, all TAFDC households with earned income will no longer be required to complete a Monthly Report.

The Department is also moving to largely automate the TAFDC reevaluation process. This process will mimic SNAP recertifications, by sending clients a prefilled Reevaluation form 45 days before the end of the cash reevaluation period.

Purpose

This Online Guide Transmittal informs DTA staff about the following:

- changes to BEACON;
- how wages and hours will be counted for working TAFDC clients;
- automations to the TAFDC reevaluation process; and
- changes to the Online Guide.

Effective with BEACON Build 48.1, currently scheduled for November 23, 2015, clients with earned income will no longer have to comply with the cumbersome Monthly Report process. All clients receiving Monthly Reports

**Purpose
(continued)**
Impact for
Employed
Clients

will have their benefits recalculated prospectively rather than retrospectively and receive an EBC Notice informing them of the change. A Narrative will also be created: "Benefit recalculation requested due to termination of Monthly Reporting."

Clients will only be required to verify their wages and hours every six months unless their gross earnings change by more than \$100 in a month. This information will be used to calculate their prospective budget for that time period. However, a client may request a recalculation and submit verification of a change at any time, even if that change is less than \$100. Finally, there will be no overpayment unless the change would result in a \$100 decrease in benefits; nor will there be a need to issue related benefits due to an underpayment, unless the client reports the change in income timely.

Clients with earnings must submit their final Monthly Report in November. The information reported on this Monthly Report will be used to calculate the prospective income and work participation hours for up to six months. Beginning November 20th, clients will be mailed a notice advising them of this change.

Examples: If the client income is released in Interview Wrapup after the cycle release date of January, then the monthly grants impacted would be in: February, March, April, May, June and July. If the client income is released in Interview Wrapup on/before the cycle release date of January, then the grants impacted would be January, February, March, April, May and June.

Effective with BEACON Build 48.1 there will no longer be a Monthly Reporting workflow. Clients currently on Monthly Reporting who do not complete their final report, will divert and then close. In order to be reopened, the Earned Income page must be updated, eligibility verifications received and only then may the case may be reinstated.

These changes are intended to make it easier for working TAFDC clients to manage their budgets and will allow case managers to focus on helping clients transition to meaningful employment.

Reevaluation
Automation

At this same time, all TAFDC clients with reevaluation end dates after January 7, 2016 will begin to receive prefilled Reevaluation forms 45 days before the end of their reevaluation period. Individuals who are due for reevaluations before then will have their ongoing eligibility determined through the current manual process.

The steps to completing a reevaluation have not changed. A reevaluation is not considered complete unless the client:

**Purpose
(continued)**

- completes the Reevaluation form;
- is interviewed by the case manager; and
- provides requested required verifications.

The case manager must then process the case through Interview Wrapup. Failure to complete all these steps before the reevaluation end date will cause the TAFDC case to **automatically close**.

Frequency

Households where all adult members are on SSI or the grantee is an ineligible non-labile relative will receive automated prefilled Reevaluation forms yearly. All other households will receive automated prefilled Reevaluation forms every 6 months.

Cases may be reviewed more frequently as determined necessary by the Department.

**Purpose:
Focus of
Reevaluation
Interview**

During the reevaluation interview, while it is important to focus on client eligibility by conducting the interview and entering information on BEACON, it is equally important to focus on ways to help the client reach economic self-sufficiency. This includes referrals to appropriate ESP activities as well as supportive services such as childcare, Hi-SET vouchers and transportation reimbursement for ESP-eligible clients. The TAFDC Orientation is a great opportunity for clients to hear about available programs in their area. More frequent reviews will provide clients and the Department the ability to more closely monitor progress to self-sufficiency, as well as provide interventions and supports.

Example 1: Molly O'Connor is a single mother age 22 and is currently exempt as her child, Josie, is 20 months old. During Ms. O'Connor's reevaluation her case manager determines that she will be subject to the work program in 4 months when Josie turns two and asks Ms. O'Connor if she has any barriers to finding or maintaining employment. Ms. O'Connor states that in the past she has only been able to get part-time minimum wage jobs because she did not complete high school. She also states that childcare has been an issue at times. Ms. O'Connor's case manager then provides her with a referral to the YPP in her area and explains that getting a jump start on obtaining her high school equivalency will make her better prepared for meaningful employment and ready her for additional education and training. The case manager also reviews eligibility for childcare and transportation reimbursement. If she volunteers to participate, Ms. O'Connor will be better positioned once she is subject to the work program and time-limited benefits.

Example 2: Sal and Jenna Jackson are currently exempt, as Jenna is on SSI and Sal is caring for their seven-month-old baby. During the

**Purpose
Focus of
Reevaluation
Interview
(continued)**

reevaluation, the case manager explores with Sal whether he would like to voluntarily participate in a work-related activity, his employment-related strengths he has and what barriers he has faced to find employment. Sal states that he has a hard time in the work place, often having difficulty getting along with coworkers and following directions and has been fired many times. He also states that he has a hard time filling out job applications and forms. The case manager offers a Learning Disability screening and explains how completing the screening and assessment may help Sal to become more successful in the work place.

Example 3: Maria DaSilva receives SSI for herself and TAFDC for her 16-year-old son Jason. The case manager notices that Ms. DaSilva appears very nervous and has difficulty making eye contact. When asked how the family is doing in moving toward economic self-sufficiency, Maria states she is concerned about Jason’s attendance and grades at school. The case manager further explores Maria’s situation. Maria discloses that there has been ongoing domestic violence issues with her boyfriend and believes that Jason’s poor school performance is a direct result of this situation. She is upset and doesn’t know what to do. The case manager encourages Ms. DaSilva to speak with the Domestic Violence Specialist in the TAO about services in the area. Ms. DaSilva is happy to hear about this support.

By having more frequent interventions with clients, the Department hopes to have greater success in moving families to economic self-sufficiency.

**Eliminated
Online Guide
Chapter**

The following Chapter is being eliminated from the Online Guide:

Topic: TAFDC
Book: Employment
Chapter: Monthly Reporting

**Updated
BEACON Online
Guide
Books/Pages**

Topic: TAFDC
Book: Basic Case Activities & Maintenance
Chapter: Reevaluations
Page: Reevaluations Overview

Topic: TAFDC
Book: Basic Case Activities & Maintenance
Chapter: Reevaluations
Page: Reevaluations-Related View and Actuate Report

**Updated
BEACON Online
Guide
Books/Pages
(continued)**

Topic: TAFDC
Book: Basic Case Activities & Maintenance
Chapter: Reevaluations
Page: Case Manager Responsibilities

Topic: TAFDC
Book: Basic Case Activities & Maintenance
Chapter: Reevaluations
Page: Reevaluations TAFDC

Topic: TAFDC
Book: Basic Case Activities & Maintenance
Chapter: Reevaluations
Page: Reevaluations Q and A

Topic: TAFDC
Book: Basic Case Activities & Maintenance
Chapter: Views
Page: Daily Priority Action Views

Topic: TAFDC
Book: Basic Case Activities & Maintenance
Chapter: Verifications
Page: Verifications at Reevaluations and Case Maintenance

Topic: EAEDC
Book: Basic Case Activities & Maintenance
Chapter: Views
Page: Daily Priority Action Views

Topic: EAEDC
Book: Basic Case Activities & Maintenance
Chapter: Verifications
Page: Verifications at Reevaluations and Case Maintenance

Topic: TAFDC
Book: Program Nonfinancial Requirements
Chapter: Extension of Benefits Beyond the 24-Month Period
Page: Extension Request Views and Edit

**Updated
BEACON Online
Guide
Pages
(continued)**

Topic: TAFDC
Book: Program Nonfinancial Requirements
Chapter: Work Program Sanctions
Page: Good Cause Warning Notices

Topic: TAFDC
Book: Program Nonfinancial Requirements
Chapter: Work Program Sanctions
Page: Removing Pending Work Program Sanctions

Topic: TAFDC
Book: Financial Requirements
Chapter: Income - TAFDC
Subchapter: Income Overview
Page: Types of Income - TAFDC

Topic: TAFDC
Book: Financial Requirements
Chapter: Income - TAFDC
Subchapter: Income Overview
Page: Verification of Income - TAFDC

Topic: TAFDC
Book: Services
Chapter: Transportation
Page: Transportation Overview

Topic: TAFDC
Book: Basic Case Activities & Maintenance
Chapter: Closings and Denials
Page: Removing the Pending Closing of a Case or Individual Client

Topic: TAFDC
Book: Employment
Chapter: Employment
Page: Employment Overview

Topic: TAFDC
Book: Employment
Chapter: Employment
Page: Work-Related Expense Deduction

Updated
BEACON Online
Guide
Pages
(continued)

Topic: TAFDC
Book: Employment
Chapter: Employment
Page: Eligibility for 30 1/3 or 30 1/2 Earned Income Disregards from Gross Earnings

Topic: TAFDC
Book: Employment
Chapter: Employment
Page: Earned Income Page – Earnings Tab

Topic: TAFDC
Book: Employment
Chapter: Employment
Page: Earned Income Page – Prospective Tab

Topic: TAFDC
Book: Employment
Chapter: Employment
Page: Earned Income Page – Expenses Tab when Self-employed

Topic: TAFDC
Book: Employment
Chapter: Employment
Page: Entering Health Insurance Data

Topic: TAFDC
Book: Employment
Chapter: Employment
Page: Changing Health Insurance Data

Topic: SNAP
Book: Eligibility Requirements
Chapter: Assets
Subchapter: Entering Assets on BEACON
Page: Assets Overview

Topic: SNAP
Book: Eligibility Requirements
Chapter: Assets
Subchapter: Transfer of Funds
Page: Transfer of Funds

Topic: SNAP
Book: Eligibility Requirements
Chapter: Noncitizens
Page: Sponsor Deeming

**Updated
BEACON Online
Guide
Pages
(continued)**

Topic:	SNAP
Book:	Eligibility Requirements
Chapter:	Categorical Eligibility
Page:	Categorical Eligibility
Topic:	SNAP
Book:	Reporting Requirements/Recertifications
Page:	SNAP Reporting Requirements and Recertification
Topic:	SNAP
Book:	Reporting Requirements/Recertifications
Page:	Annual Reporting including Interim Report
Topic:	Cross Program
Book:	Harper/ADA
Page:	ADA Accommodation Process Case Manager Approval
Topic:	Cross Program
Book:	Interview Wrapup
Page:	Interview Wrapup Overview
Topic:	Cross Program
Book:	Interview Wrapup
Page:	Interview Wrapup EBC Results Page
Topic:	Cross Program
Book:	Interview Wrapup
Page:	The Financial Tab
Topic:	Cross Program
Book:	Interview Wrapup
Page:	Interview Wrapup Request Type Priority Benefit Authorization Level
Topic:	Cross Program
Book:	Interview Wrapup
Page:	Release Date Rules
Topic:	Business Process Redesign (BPR)
Book:	BPR Overview
Page:	Narrative Guidelines Overview

**Updated
BEACON Online
Guide
Pages
(continued)**

Topic: Business Process Redesign (BPR)
Book: Procedures (BPR)
Chapter: Front Office Procedures
Page: Determining Document Urgency

Topic: Business Process Redesign (BPR)
Book: Procedures (BPR)
Chapter: Front Office Procedures
Page: Documents Received Too Late to Use

Topic: Business Process Redesign (BPR)
Book: Procedures (BPR)
Chapter: Front Office Procedures
Page: Handling Incomplete and Unsigned Forms

Topic: Business Process Redesign (BPR)
Book: Procedures (BPR)
Chapter: Processing Procedures
Page: Re-indexing Misidentified Documents

**New
BEACON Online
Guide
Page**

Topic: TAFDC
Book: Basic Case Activities & Maintenance
Chapter: Reevaluations
Page: Reevaluation Notices Timeline

Questions

If you have any questions, please email the DTA Mailbox.
Systems questions should be directed to the System Support Help Desk.
