



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

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Secretary

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**Online Guide Transmittal 2019-25  
April 4, 2019**

**To: Department of Transitional Assistance Staff**

**From:  Paul Sutliff, Assistant Commissioner for Programs and Field Operations**

**Re: Cross Program: Updates Related to the Online and Paper Submission of Interim Reports and Recertifications**

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**Overview**

The Department has updated the paper version of the Interim Report and Recertification forms. In addition, DTA is implementing the online submission of Interim Reports and Recertifications through DTACConnect.com. These updates are scheduled to go live on April 16, 2019. These enhancements along with updated guidance from the United States Department of Agriculture Food and Nutrition Services (USDA-FNS) result in several procedural changes to the way SNAP cases are handled at the Interim Report and Recertification periods.

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**Purpose**

The purpose of this Online Guide transmittal is to advise staff of:

- procedural changes related to the new Interim Report and Recertification forms; and
  - the implementation of the electronic submission of Interim Reports and Recertifications via DTACConnect.com.
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**Procedural  
Changes**

Change Reporting Updates

Change Reporting households must report if their monthly earned income or unearned income at the household level changed by more than \$100. This reporting requirement is applicable during the entire certification period.

Interim Report Process Updates

- The threshold for unearned income changes during the Interim Report period changed from \$50 to \$100. Like the earned income threshold, this applies at the household level.
- If the household reports a change of less than \$100, the income that was used in the previous benefit calculation must continue to be used.

**Exception:** If the Department has information that is verified upon receipt, the new information must be used in the calculation.

- Self-declarable expense information is an optional reporting element for Interim Reports, even if the information changed. If the client does not complete the optional expense portion of the Interim Report, the expenses that were used in the previous calculation must continue to be used.
  - The BEACON workflow will indicate whether an Interim Report has changes reported or other outstanding components, such as available documents or matches.
  - If there are no other outstanding elements, staff must immediately authorize Interim Reports with no changes or with changes under the required threshold. Staff must not review other pages or check data sources.
  - Staff must review the data sheets in their entirety and satisfy whatever is outstanding. Staff must only review the portion of the workflow that has an outstanding element. For example, if a client reported a change to dependent care and nothing else is outstanding, only the dependent care section must be reviewed and updated.
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Recertification Process Updates

- Few case elements are prepopulated on the new Recertification form. Unlike at Interim Report, all elements in BEACON must be reviewed, regardless of whether the information is captured on the submitted form. These elements must be discussed during the interview, if one is required, verified via external databases, or prompt a Verification Checklist if there are outstanding items.
- Clients are only asked to write information on the Recertification form if that written information is sufficient to verify that element, for example, shelter costs or household composition.
- Clients are no longer asked to write their income. Income must always be verified, with few exceptions. This change will prevent unnecessary data entry by clients and staff. A list of common verification elements, including income factors, is included on the form to encourage clients to submit verifications with the form.
- Clients who are eligible to claim medical expenses are only required to verify changes in monthly medical expenses greater than \$25.

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**Updated Online  
Guide Pages**

<b>Topic:</b>	SNAP
<b>Book:</b>	Certification Types
<b>Chapter:</b>	Change Reporting
<b>Page:</b>	Change Reporting - Overview
<b>Topic:</b>	SNAP
<b>Book:</b>	Certification Types
<b>Chapter:</b>	Change Reporting
<b>Page:</b>	Change Reporting - Recertification
<b>Topic:</b>	SNAP
<b>Book:</b>	Certification Types
<b>Chapter:</b>	Simplified Reporting
<b>Page:</b>	Simplified Reporting - Interim Report
<b>Topic:</b>	SNAP
<b>Book:</b>	Certification Types
<b>Chapter:</b>	Simplified Reporting
<b>Page:</b>	Simplified Reporting - Recertification

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**Updated Online  
Guide Pages  
(continued)**

**Topic:** SNAP  
**Book:** Certification Types  
**Chapter:** Simplified Reporting  
**Page:** Simplified Reporting Examples

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

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

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**Questions**

If you have any policy or procedural questions, after conferring with the appropriate TAO personnel, please have your Systems Information Specialists or TAO management email the DTA Procedural Issues Mailbox.

Systems issues should be directed to the Systems Support Help Desk.

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