



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


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Commissioner

**Online Guide Transmittal 2021-85  
November 10, 2021**

**To: Department of Transitional Assistance Staff**  
**From:**  **Sarah Stuart, Associate Commissioner for Change Management**  
**Re: TAFDC and EAEDC: Asset Eligibility Limits Eliminated**

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**Overview**

A change in legislation has eliminated the asset limits for both the TAFDC and EAEDC programs. This change is retroactive to July 1<sup>st</sup>, 2021.

**Effective immediately**, assets will no longer be counted when determining eligibility for TAFDC and EAEDC. Assets include but are not limited to bank accounts, vehicles, personal property, real estate, the cash surrender value of life insurance, cash on hand and bank deposits.

Additional information is forthcoming regarding regulatory changes, eligibility, and next steps for families that were closed or denied due to asset limits on or after July 1<sup>st</sup>, 2021. Until BEACON changes are completed, staff will receive ongoing reports of cases pending to close or denied for assets. Staff are to approve these cases if otherwise eligible.

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**Purpose:**

The purpose of this Online Guide Transmittal is to advise staff that effectively immediately TAFDC and EAEDC applicants and recipients are no longer subject to an asset limit.

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**BEACON Asset-  
Related Pages  
and Actions:**

Staff are not to request verification for any assets. Until BEACON enhancements are completed any existing assets such as vehicles, financial holdings and/or insurance information must be ended, except for bank account information. To maintain Direct Deposit functionality, staff must ask clients if they have a bank account for Direct Deposit purposes only. Institution name, account type, account number and routing number must all be entered into BEACON on the Liquid Assets page. The account balance must be entered as \$0.00.

**Direct Deposit:** Rules regarding Direct Deposit have not changed. A VC-1 for a Direct Deposit Form must be sent to the client. Once bank account information has been entered on the Liquid Assets page in BEACON, two verifications will populate on the Verifications Tab for Liquid Assets. The first verification is to verify the value of the asset. The second verification is for a Direct Deposit Form.

The verification element for the value of the asset must be dispositioned by the worker as verified, selecting “Other” under Documents of Evidence and entering “N/A” in the “Other” field. This verification must not be listed on the VC-1 sent out to the client.

The verification for Direct Deposit form must be requested. When the VC-1 is printed the partially prefilled Direct Deposit form will be sent as an addendum.

**Matches:** The data match specialists continue to be responsible for dispositioning bank matches. The FIDM unit is working on clearing cash related matches so that they won’t cause any delays in processing cases. If staff come across a bank match that has not been dispositioned yet, an email is to be sent to [DTA.DataMatchInquiry@mass.gov](mailto:DTA.DataMatchInquiry@mass.gov) so that a data match specialist can be assigned to clear the match.

**Vehicles:** Any active vehicle matches for TAFDC and EAEDC cases showing on the External Data match on the Vehicles page in BEACON should be dispositioned as “Already known to BEACON”.

No TAFDC or EAEDC client is to be denied or closed for any asset related reason, including but not limited to assets in excess of limits and/or failure to verify asset.

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**Obsolete Online  
Guide Pages**

The following Online Guide pages are obsolete:

**Topic:** Cross Programs  
**Book:** Applications  
**Chapter:** TAFDC Application Interview  
**Page:** Application Interview: Assessed Person Assets Workflow

**Topic:** EAEDC  
**Book:** Financial Requirements  
**Chapter:** Assets  
**Page:** Assets Overview

**Topic:** EAEDC  
**Book:** Financial Requirements  
**Chapter:** Assets  
**Page:** Inaccessible Assets

**Topic:** EAEDC  
**Book:** Financial Requirements  
**Chapter:** Assets  
**Page:** Joint Ownership of Assets

**Topic:** EAEDC  
**Book:** Financial Requirements  
**Chapter:** Assets  
**Page:** Noncountable Assets

**Topic:** EAEDC  
**Book:** Financial Requirements  
**Chapter:** Assets  
**Page:** Transfer of Assets

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**Obsolete Online  
Guide Pages  
(continued)**

**Topic:** EAEDC  
**Book:** Financial Requirements  
**Chapter:** Assets  
**Page:** Countable Assets

**Topic:** TAFDC  
**Book:** Financial Requirements  
**Chapter:** Assets  
**Subchapter:** Countable Assets  
**Page:** Countable Assets

**Topic:** TAFDC  
**Book:** Financial Requirements  
**Chapter:** Assets  
**Subchapter:** Countable Assets  
**Page:** Asset Types- Liquid Assets

**Topic:** TAFDC  
**Book:** Financial Requirements  
**Chapter:** Assets  
**Subchapter:** Countable Assets  
**Page:** Asset Types- Financial Holdings

**Topic:** TAFDC  
**Book:** Financial Requirements  
**Chapter:** Assets  
**Subchapter:** Countable Assets  
**Page:** Asset Types- Insurance

**Topic:** TAFDC  
**Book:** Financial Requirements  
**Chapter:** Assets  
**Subchapter:** Countable Assets  
**Page:** Asset Types- Vehicles

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**Obsolete Online  
Guide Pages  
(continued)**

**Topic:** TAFDC  
**Book:** Financial Requirements  
**Chapter:** Assets  
**Subchapter:** Countable Assets  
**Page:** Asset Types- Real Property

**Topic:** TAFDC  
**Book:** Financial Requirements  
**Chapter:** Assets  
**Subchapter:** Countable Assets  
**Page:** Asset Types- Pensions

**Topic:** TAFDC  
**Book:** Financial Requirements  
**Chapter:** Assets  
**Subchapter:** Countable Assets  
**Page:** Asset Types- Refunds

**Topic:** TAFDC  
**Book:** Financial Requirements  
**Chapter:** Assets  
**Subchapter:** Countable Assets  
**Page:** Asset Types- Vehicles Examples

**Topic:** TAFDC  
**Book:** Financial Requirements  
**Chapter:** Assets  
**Page:** Joint Ownership of Assets

**Topic:** TAFDC  
**Book:** Financial Requirements  
**Chapter:** Assets  
**Page:** Noncountable Assets

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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 them to DTA.Procedural Issues.

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

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