



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


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**Online Guide Transmittal 2021-93
November 26, 2021**

To: Department of Transitional Assistance Staff
From:  Sarah Stuart, Associate Commissioner for Change Management
Re: TAFDC and EAEDC: Implementation of the Asset Limit Repeal–Phase 2

Overview

A change in legislation has eliminated asset limits for both the TAFDC and EAEDC programs. This change is retroactive to July 1st, 2021. The Department is beginning the second phase of implementation for the asset limit repeal where eligibility will be assessed for certain households who were closed or denied in part or due to the asset limit since July 1, 2021. These households will be notified of this change in one of the following ways:

- An informational notice will be mailed informing impacted clients to contact DTA to review potential past and ongoing eligibility for TAFDC/EAEDC benefits; and
 - A list of clients who were denied, closed, or withdrew an application for an asset related reason since July 1 but who are now pending or active or have since been denied or closed for a non-asset related reason will be sent to local offices for case managers to contact these clients directly about potential past and/or ongoing eligibility.
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Purpose:

The purpose of this Online Guide Transmittal is to advise staff about the second phase of the asset limit repeal implementation including:

- Notifying clients that may have previously or are now eligible for TAFDC/EAEDC benefits due to the asset limit repeal.
 - Procedures for assessing prior and current eligibility for these clients; and
 - Procedures for issuing additional related benefits, if any, to certain clients including Crib & Layette and Clothing Allowance payments.
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Client Notification:

Identified individuals and households whose eligibility for TAFDC/EAEDC benefits may have been affected by the asset limit repeal have been sent an informational notice titled “You May Now be Eligible for Benefits”. This notice will inform them that there is no longer an asset limit, and they may now be eligible for TAFDC/EAEDC benefits. The notice will direct those who wish to be assessed for prior and/or ongoing eligibility to contact the staff listed on the notice by February 26, 2022.

A list of additional identified individuals and households whose eligibility for TAFDC/EAEDC may also have been affected by the asset limit repeal will be sent to the applicable office management team. Staff will reach out to the identified cases and assess their eligibility for any potentially owed benefits due to the asset limit repeal. In the case of withdrawn applications, ongoing eligibility must also be assessed.

Case Manager Responsibilities:

For those individuals or households who receive the informational notice or are included on the local office list of additional identified individuals or households, the case manager must assess eligibility for TAFDC/EAEDC benefits:

- for the time the case was closed or denied due to an asset related reason since July 1, 2021, **and**
- for ongoing eligibility for TAFDC/EAEDC benefits.

All narratives relating to the asset limit repeal must begin with “Asset Limit Repeal Assessment” to help clearly identify impacted cases. The case manager must document, at minimum, the following in the narrative:

- All relevant eligibility information for the months being assessed.
 - All relevant eligibility information for related benefits, including the assessed time period and total amount of related benefit.
 - All relevant eligibility information for additional related benefits such as Crib & Layette and Clothing Allowance benefits.
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**Case Manager
Responsibilities
Continued:**

Staff must reach out to clients who appear on the list of identified individuals and households whose eligibility for TAFDC/EAEDC may also have been affected by the asset limit repeal. Three cold calls are to be made to the client to review eligibility for any months since July 1, 2021 that they were closed or denied due to an asset related reason. All attempts to contact the client must be clearly documented in the Narrative tab.

- If cold calls are not successful, a case maintenance appointment must be scheduled. If the client misses the appointment, **no negative action** is to be taken on the case.
- If all attempts to contact the client are unsuccessful, eligibility for related benefits must be reviewed during the next scheduled reevaluation.

If a client requests to reapply for TAFDC/EAEDC after receiving the "You May Now be Eligible for Benefits" informational notice, a Request for Assistance must be initiated in BEACON. If the case meets all other eligibility conditions, the application must be approved for ongoing benefits.

If it is determined that the case is also owed benefits for some or all of those months since July 1, 2021 that they were closed or denied due to an asset related reason, the case manager must manually issue a Related Benefit the day after case approval.

If a client does not wish to reapply, or will be ineligible for ongoing benefits, the case manager must still assess potential eligibility for owed benefits. This includes those months since July 1, 2021 that the individual or household was closed or denied benefits due to an asset related reason but met all other income and eligibility requirements.

- If it is determined that the individual or household is **only** eligible for a related benefit (not ongoing), staff must complete a Request for Assistance Only in BEACON.
 - Once the case is pending, staff must determine eligibility for the identified months since July 1, 2021 that they were closed or denied due to an asset related reason and the correct related benefit amount, including issuing a VC-1 to verify any mandatory information that would impact the benefit level.
 - Once the correct related benefit is determined, staff must manually issue a related benefit in BEACON to the pending case. The day after the related benefit has been issued, the case must be closed for "Administrative Closure" under Reason Category "Admin -TAO".
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**Case Manager
Responsibilities
Continued**

Note: When considering eligibility and income limits, be sure to include household members previously in the assistance unit at that time. Related benefits owed are to be issued using the Retro Payment for Supplement type. A narrative must be entered detailing the calculation and breakdown of the related benefit issued, such as what portion is for the grant and what portion is for a crib and layette payment.

Remember, when assessing an individual or household for past eligibility, a client cannot be expected to prove a negative. In these situations, a telephonic or written self-declaration along with a check of other data sources available to the Department is appropriate.

For example, if a client provides a telephonic self-declaration stating they had no income in the month of August 2021 and there is no contradictory income information viewable through DUA, SSA or the Work Number for all members of the assistance unit, and no income is found, you must accept the self-declaration that they had no income for the month of August 2021.

**Issuing Related
Benefits:**

For cases that are being opened and are determined to have been otherwise eligible for benefits for those months since July 1, 2021 that they were closed or denied due to an asset related reason, it is the case manager's responsibility to manually issue the related benefit in BEACON.

The Proration Calculation Sheet has been developed so staff do not have to calculate related benefits manually. This standardized tool must be used by all DTA staff when calculating prorated benefits. The Proration Calculation Sheet is located on the BEACON Home page under Useful links.

Important: Related benefits **must not** be calculated based on a 365-day year. You must use the Retro Benefit Calculation tool to calculate prorated benefits.

In the Proration Calculation Sheet, staff should utilize the CASH Proration calculation option under the EBC Result/Scenario dropdown box, this option is used when the client is owed related benefits and has not received any benefits for that period.

The calculation tool requires staff to know the monthly benefit amount. If the monthly benefit amount is not available in EBC results, the What If tool must be used.

When a household has a calculation that includes multiple benefit payment cycles, and a change has occurred between cycles, staff will need to complete multiple calculations to determine an accurate related benefit.

Issuing Related Benefits Continued:

After determining the total amount of related benefits owed to a client, the Related Benefits page in BEACON must be completed. To create a related benefit in BEACON, go to the Program Administration workflow, open the Related Benefits page and follow the steps below:

1. Select the type of benefit from the Type drop-down list.
2. Enter the amount in the Amount field.
3. Enter the date when the Related Benefit period begins. You can select a date from the popup calendar.
4. Enter the date when the Related Benefit period ends. You can select a date from the popup calendar.
5. Click Save.

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.