Operations Memo 2012-45
September 28, 2012

To: **Department of Transitional Assistance Staff**

From: **Stephanie Brown, Assistant Commissioner for Policy, Program and External Relations**

Re: **Interview Page for all Department Programs**

Overview

The Department has created an Interview page to capture information about the application, revaluation, and recertification interview. The completion of this page is applicable for all Department programs. The Interview page affirms the Department's responsibility to interview clients at application, reevaluation, and recertification. This enhancement to the system is valuable for customer service, program assessment and overall program management.

Purpose of Memo

This Operations Memo:

- explains the functionality of the Interview page; and

- issues procedures for completing the Interview page.

BEACON Changes

Effective with BEACON Build 44.9, a new Interview page will capture information about the application, reevaluation /recertification interview. The Interview page is the last page of the AU Composition Details metasection.

Interview Page

Completion of the Interview Page

Case managers are required to complete the Interview page for all clients at application, reevaluation and recertification.

BEACON Changes (Continued)

Interview Page

The Interview page includes the following fields:

Program: prefilled from data already entered in the BEACON workflow.

Grantee: name of the grantee prefilled from data already entered in the BEACON workflow.

Held: requires the case manager to select the appropriate radio button (Yes or No) to indicate whether or not the interview was held.

Method: captures the interview method. The dropdown list selection will be filtered so that only applicable interview methods will be displayed for the case.

Interview: requires an entry for the date the interview was conducted.

No Reason: captures the reason no interview was conducted. The dropdown list selection will be filtered so that only applicable interview methods will be displayed for the case. For SNAP, the age, disability and earnings status of household members will also determine the available items on the dropdown list.

Reason: captures the date associated with the No Reason entry.

Reinstatements

When an application is denied for missing verifications and subsequently reinstated or when a reevaluation/recertification is closed and subsequently reinstated, case managers will be required to complete the Interview page, if the Interview page was not completed prior to the denial or closing.

Interim Reports (IR)

Once an IR is initiated, the Held field on the Interview page will default to No and the No Reason field will default to No Interview Required. Prior to the request being released, the case manager may return to the Interview page and change the information there, if an interview was subsequently conducted for the IR client.

Bay State CAP Recertification

BEACON will bypass the Interview page for all Bay State CAP recertifications. The Interview page will be prefilled to indicate that an interview was not held and the No Reason field will default to Bay State CAP.

BEACON Changes (Continued)

Interview Page

Combination Cases

When completing the Interview page for a combination cash/SNAP application or a combination cash/SNAP revaluation, the case manager may enter the interview method and the date for one program and then select the Use All Programs box at the bottom of the Interview page. BEACON will automatically populate the other case(s) with the same interview method and date.

Exception: If the method is not allowed for all programs, e.g. telephone interview for TAFDC or EAEDC applications, checking the Use all Programs box will not populate for those programs.

Elderly Disabled Clients Without Earnings

Pursuant to a waiver the Department obtained from USDA, elderly/disabled clients without earnings may have their interview waived. This information as entered on the Interview page will be displayed on the Interview wrap-up page.

Interview Wrap- Up

Interview Wrap-up Updates Tab

The interview section of the Interview wrap-up page has six new fields. These fields are display-only and will be prefilled with information entered on the Interview page for all applications, reevaluations and recertifications.

Other Considerations

Batch Closings and Denials

For applications, recertifications and Interim Reports that are automatically closed or denied by batch, the interview method and interview date indicated by the case manager will be brought over and displayed on the Interview Wrap-up page by the batch job before the denial or closing request is released.

If no method is entered by the case manager, close-no interview or denied-no interview will be set by batch.

Override of Interview Method and Interview Date

Once Interview page data is wrapped-up and released, the information entered on the page cannot be changed. If it is determined that information previously entered on the Interview page needs to be changed, and the request has already released, a supervisor's override will be necessary to make the change(s) on the Interview page.

Other Considerations (Continued)

Applications, Reevaluations/Recertifications and IRs in Progress Prior to October 1, 2012

Applications, reevaluations and recertifications in progress prior to October 1 will require reedit on the Interview page. If the case manager attempts to wrap-up the case without completing the Interview page the following message will display: *Before the request can be authorized, please return to the Interview page and enter the missing interview information.* This will direct the case manager to go to the Interview page to enter the missing information.

For SNAP cases with no application or recertification in progress prior to October 1, the last interview record will display on the Interview page in Interview page history.

Questions

If you have any questions, please have your Hotline designee call the Policy Hotline.