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Executive Office of Health and Human Services

Department of Transitional Assistance

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Operations Memo 2012-8
February 6, 2012

To: **Department of Transitional Assistance Staff**

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

Re: **TAFDC, EAEDC and SNAP – Verification Functionality Change in BEACON**

Overview

Effective with BEACON Build 44.6, scheduled for February 6, 2012, the following changes occurred to the Verification tab:

- Double-clicking a Verification Item will open the Verification Details page for the Documents of Evidence (formerly called Item). This mirrors functionality of selecting the Documents of Evidence and clicking on the *Details...* button;

- A new check box was added allowing selected verifications to be used to verify multiple eligibility factors; and

- A new button *Verify All…* was added between the *Details…* button and the *Print…* button.

The following change occurred on the Print Documents page:

- The page was changed to add a Worker (name) field followed by the Information popup button.

These changes were made to provide time savings procedures for TAO staff.

Purpose of Memo

This Operations Memo:

- explains the new functionality to TAO staff; and
- provides procedures for using this new functionality.

Verification Tab Functionality Changes: Entering Verification

Prior to this Build, when case managers wanted to enter a verification that has been returned by the client, they would:

- select the verification that was brought to them;
- click the *Details...* button; and
- select the verification method from the Documents of Evidence list from the Verification Details page.

Currently, when case managers want to enter a verification that has been returned by the client, they can now:

- double click the verification that has been returned by the client; and
- select the verification method from the Documents of Evidence list on the Verification Details page.

Both methods may still be used when recording returned verification, however, the second method is preferable when recording multiple verifications at the same time.

Verification Tab Functionality Changes: Verification Detail Page Check Box

A new field was added to the Verification Details pop-up page: “Use all checked Documents of Evidence to verify any remaining, application unverified Verification items. Documents of Evidence such as ‘Other’ and ‘Electronically validated…’ will not be applied.”

Once a verification method has been selected from the Documents of Evidence list on the Verification Details page, case managers may click the check box next to the new field and click Save. The Documents of Evidence selected will be used to verify any remaining, appropriate unverified Verification Items for the client.

Example: Mary Jones provides her case manager with a birth certificate to prove her identity. Mary still has outstanding verifications for: Date of Birth. Mary’s case manager selects Birth Certificate as the Documents of Evidence for Identity, then clicks the check box next to the new field and clicks on Save. The verifications for Date of Birth is now marked as Yes under the Verified column on the Verification tab as well.

Verification Tab Functionality Changes: Verification Detail Page Check Box (continued)

Important: Before clicking the check box, case managers must ensure that the Documents of Evidence selected can be used to verify any remaining, appropriate unverified Verification Items. For example, a rent receipt without an address should not be used to verify an address, but may be used to verify household rent amount. In this situation, the case manager would use it to verify the rent amount and would not click the check box.

Note: Selected Documents of Evidence will not be applied to another similar Verification Item. For example, if there are two Earned Income Items, the Documents of Evidence for the first job will not be used to update the second job using the check box.

Verification Tab Functionality Changes: *Verify All…* Button

A new button: *Verify All…* was added between the *Details…* button and the *Print…* button on the Verification tab. This button is useful if a client returns multiple verifications at the same time.

When a client returns multiple verifications at the same time, a case manager should:

- go to the Verification tab;
- click the *Verify All…* button;
- on the Verify All page, click the check box of the client for whom the verification is being provided. A listing of <u>all</u> Documents of Evidence for the remaining verifications will appear in alphabetical order in the Verification Documents field;
- click the appropriate Document of Evidence that the client provided;
  Note: As much as possible, case managers should avoid using "generic" Documents of Evidence in favor of specific Documents of Evidence. For example use birth certificate instead of copy of legal document.
- once all appropriate Documents of Evidence have been selected, click either Save or Select. A pop-up message will ask if you want to save your changes: click Yes; and
- all selected verifications will be marked as Yes under the Verified column on the Verification tab. Repeat this process for each client in the case whose verification is being provided.

Print Documents Page Change

Prior to this Build, when case managers who were duty workers wanted to generate a VC-1 to a client for missing verification, their name (the duty worker's name) would appear on the VC-1 given to the client.

Currently, when a case manager who is a duty worker wants to generate a VC-1 to a client for missing verification, he or she would:

- enter the missing verification on the Verifications tab and click Print;
- on the Print Documents page, select the document (in this case Verification Checklist);
- click the Information symbol next to the Worker drop-down box;
- click the name of the client's case manager; and
- click *Generate*. The VC-1 will now display the client's case manager as the person to whom the client should return the verification.

Important: This functionality is also available when generating INT-1s and INT-2s.

Final Reminder

TAO staff is reminded that verifications must be recorded on the Verification tab as they are received at the TAO.

Questions

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

Systems questions should be directed to the EOHHS Customer Service Center.