



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

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**Operations Memo 2014-10
February 10, 2014**

To: Department of Transitional Assistance Staff

From: *JC* Lydia Conley, Acting Assistant Commissioner for Policy, Program and External Relations

Re: Division of Hearings BEACON Functionality

Overview

The Division of Hearings (DOH), an impartial unit within the Department, administers hearings and renders decisions for appeals requested by applicants and clients (hereafter referred to as clients). DOH is also responsible for those cases brought by the Administrative Disqualification Unit (ADU) and the Department of Revenue (DOR) regarding overpayments and program violations.

Prior to BEACON Build 46.1, DOH operated through a largely manual process and utilized the Hearing and Appeal Tracking System (HATS) program to track and implement hearings related decisions and materials. Effective with BEACON Build 46.1(February 10, 2014), DOH will no longer utilize HATS for newly filed appeals. DOH will be integrated with BEACON to offer a more efficient and automated delivery of services.

Purpose of Memo

The purpose of this Operations Memo is to:

- advise staff of new pages and views in BEACON by which to access and review DOH related materials; and
 - introduce procedures for the implementation of appeal decisions.
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**BEACON
Changes
Scheduled
Hearings**

A new view, Scheduled Hearings, has been developed to enable Fair Hearing Liaisons to monitor when there is an upcoming appeal scheduled for their TAO. This view is located under the new Appeals group under the My Office Navigation tab. The view will display all appeals that have been scheduled for a hearing at that TAO (Site TAO) and also appeals that belong to clients who are assigned to that TAO (AU TAO). An Appeals icon will be available to navigate to the Appeal Summary page from this view. This view will display the:

- Client (client's last name, first name);
- SSN (or the temporary identification number in the SSN field);
- Hearing (date and time of hearing);
- Hearing Officer (DOH staff assigned to hear the case);
- Case Manager (the case manager assigned to the case regardless of type);
- Appeal (number assigned);
- Type (Fair Hearing or ADH);
- Reason (the cause for the scheduled hearing);
- Program (will list all relevant types TAFDC, EAEDC, FS, SSP or TAX);
- AU TAO (AU to which the case is currently assigned, or if closed the TAO it was assigned to at the time of the appealed action);
- Aid Paid (Yes, if aid pending the appeal, blank if not); and
- Client Alternate Address (address client listed when requesting a fair hearing, if different than what is known to BEACON)

Note: TAX refers to appeals filed as a result of the Department's interception or intent to intercept state tax returns in order to apply to overpayment accounts.

*Implement
Appeal Decision*

When a decision has been made, the case will appear on the Implement Appeal Decision view, also located under the new Appeals group under the My Office Navigation tab. This view will display any appeals for the case manager or ADU staff that are pending Implementation after a decision is finalized on an Appeal. Additionally, the following will be displayed:

- Client (client's last name, first name);
 - SSN (or the temporary placeholder number in the SSN field);
 - Decision (Approved, Denied, or Approved in Part for Fair Hearings, and For Respondent or Against Respondent for an ADH);
 - Decision (date decision was made);
 - Appeal (number assigned by DOH);
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**BEACON
Changes
(Continued)**
*Implement Appeal
Decision*

- Type (Fair Hearing or ADH);
- Program (will list all relevant types TAFDC, EAEDC, FS, SSP or TAX);
- AU TAO (AU to which the case is currently assigned, or if closed the TAO it was assigned to at the time of the appealed action);
- Case Manager (The case manager assigned to the case regardless of type);
- Aid Paid (Yes, if aid pending the appeal, blank if not); and
- Client Alternate Address (address client listed when requesting a fair hearing, if different than what is known to BEACON).

In accordance with existing policy, if action is required by the Department, the case manager or ADU staff must implement the action no later than 30 days from the decision date. Effective with BEACON Build 46.1, case managers and ADU staff must indicate on the Implement Appeal Decision page when they have taken the action as directed by the Hearings Officer. From this view staff will select the appropriate case and click the Implement Appeal Decision icon to open the Implement Appeal Decision page. This page will display the:

- Decision (Approved, Denied, or Approved in Part for Fair Hearings, and For Respondent or Against Respondent for an ADH);
- Decision (date the decision was rendered);
- Due (date the decision must be implemented by); and
- Decision details as documented by the Hearings Officer. This includes: Jurisdiction, Action by department, Issues, Summary of evidence, Findings of facts, Conclusions of law, and Action for the department.

The case manager, if a Fair Hearing, or the ADU staff, if an ADH, must enter the date they are implementing the decision in the Implemented field. In the Comment field staff must enter a summary of the action being taken and click Save. Once Save is selected the case will no longer appear on the view as requiring implementation.

A hard edit will prevent staff from wrapping up other case actions if implementation of an appeal decision is outstanding.

Important: Supervisors and managers can review this information by utilizing the View Tools/User Staff Rollup or View Tools/Refresh as Another User features under the My Office Navigation tab.

**Appeal
Summary Page**
Field Descriptions

From the Scheduled Hearings page, staff can select the Appeal Summary icon. This icon will open the Appeal Summary page. Information displayed in this page is view only for TAO and ADU staff with the role of Hearing Liaison. This page will display the client's Last name, First name, Social Security Number (SSN) and the Assessed Person Identification (APID) number. A system-generated Appeal number will also appear at the top of the screen). This page will display the following fields:

- Type (Fair Hearing or ADH);
 - Reason (the cause for the scheduled hearing);
 - Program (TAFDC, EAEDC, FS, SSP or TAX);
 - Receipt (the date the document or request is received);
 - Filing (the date the client annotates on the hearing request);
 - Due (the date by which DOH must hear, decide and issue the decision);
 - Status (Pending or Closed);
 - Closed reason (Completed or blank, reflecting if the appeal was dispositioned);
 - Aid paid (check box indicating if the client has requested aid pending their appeal);
 - Interpreter Requested (if indicated on the hearing request form);
 - Language (prefilled with the primary language identified in BEACON, but can be changed if listed differently on the hearing request);
 - Deaf/Hard of hearing (if requested by client, indicating that an auxiliary aid will be available at the hearing);
 - Hearing (In Person or Telephonic);
 - Telephone Number (will be prefilled with the client's BEACON telephone number, but can be changed by DOH if listed differently on the hearing request);
 - AU TAO (the TAO to which the case is currently assigned, or if closed the TAO it was assigned to at the time of the appealed action);
 - Hearing (date and time hearing is re/scheduled for);
 - Hearing officer (DOH staff person assigned to hear the appeal and render a decision);
 - Site TAO (the TAO where the appeal hearing will be held);
 - Decision (values are Approved, Denied, Approved in Part for Fair Hearings, and For Respondent, Against Respondent for ADH);
 - Decision (date decision was made);
 - Good Cause (indicates the client has requested good cause to reschedule a hearing);
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**Appeal
Summary Page
Field Descriptions
(Continued)**

- Implemented (date a hearing decision action was implemented, if applicable);
- Remand (the type will be displayed as either CJR for Complaint Judicial Review or Commissioner);
- New appeal (New number assigned if remand is from CJR); and
- Residential Address (will default to residential address identified in BEACON)

*Interested
Parties*

Additionally within this page, staff will be able to see any Interested Parties whom the client or the Department has identified as person or designee with involvement in the hearing. If there are Interested Parties the following will be identified:

- Name (of the party identified);
- Type (will list the party type as Attorney, Organization, Assisting Person, UMASS Medical, DES, Local 509, NAGE or TAO Staff);
- Inform (if checked off, copies of notices relative to the hearing will be sent to this party);
- Participate (if checked off, this party attended the hearing); and
- Notify (if checked off, this party will receive a copy of the hearing decision).

Note: An Interested Party may have more than one of these check boxes marked.

**Document
History**

DOH notices are not available in Document History for users outside of the DOH unit.

**Request for
Remand**

If a request for remand is made, the case will appear as a new appeal. Those which are brought by CJR will be issued a new Appeal number. Those requests which are brought by the Commissioner will not be issued a new Appeal number.

**Interview
Wrap Up**

The existing functionality of the Interview Wrap Up page, regarding appeals has remained unchanged. If a client is receiving Aid Paid Pending appeal, DOH, will mark the Pending Request as Appealed. Once a decision is made, DOH will mark the disposition of the Pending Request.

**Policy
Reference**

See Fair Hearing Rules 106 CMR 343.000 (et. seq.).

Questions

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