Transitions

August 2014

INSIDE THIS ISSUE:

Dear Colleagues,

We have had an incredibly busy 2014 so far and we will carry that momentum into an exciting fall season for the Department!

On June 20, we began a series of client recognition events which acknowledge our TAFDC clients for their accomplishments and taking a vital step in strengthening their future, either by receiving their Hi-Set, graduating from college, completing enhanced job training, obtaining an internship, or landing a job. Clients receive a certificate of recognition for their hard work and the smile on their faces when they receive them is heartwarming. Many of our clients have never been recognized for anything and you can see the excitement in their eyes during the ceremony. Client's families and friends attend, many bringing flowers and balloons; as well as legislators, local officials, and DTA staff.

The events have been incredibly positive and at each event, as clients share their powerful and inspiring stories, I am reminded of why we work so hard to help our clients move forward and see that hard work pay off.

Our first event was held in Lawrence, where we recognized nearly 200 clients and since then, we have held events in Worcester, Holyoke, Pittsfield, Brockton, Plymouth, Framingham, Chelsea, Fall River, Greenfield, and Fitchburg, Boston, Malden, and Lowell recognizing more than 1,180 clients for their achievements. I'm hoping everyone can make at least one of these events as they are a great chance to see the positive change that you help create in our clients' lives. We are holding our next series in January.

In late July, we joined the Department of Agricultural Resources (DAR) in launching our second Farmers Market Tour to promote access to healthy food options for low-income residents. Farmers Markets play an important role in helping client access healthy food at an affordable price. Many of the markets that accept SNAP also have programs that match or double the amount of produce clients can.

Believing you can.   DEPARTMENT OF TRANSITIONAL ASSISTANCE   **www.mass.gov/dta**

Commissioner's Corner *(Continued from Page 1)*

In June, we hosted the five local Massachusetts Mobile Markets in Worcester, which provide access to fresh produce to underserved areas in Lowell, Boston, Springfield, Somerville, and Worcester, to kick-off their season. Mobile Markets provide access to healthy fruits and vegetables, provide recipes for nutritious meals, host events and demonstrations to severely underserved areas and we look forward to working with them throughout the fall.

On July 17, I joined colleagues from our sister agency at the Plymouth Farmers Market and participated in a healthy cooking demonstration with the amazing team at UMass Extension, which highlighted how to cook a nutritious meal on a tight budget. I also had the opportunity to tour the market and observe all that it had to offer our clients. I hope to see you at one of our upcoming events. The schedule for the rest of the summer is below:

Event	Location	Date	Time
New Bedford Client Recognition	New Bedford DTA Office 160 West Rodney French Blvd. New Bedford	8/25 Monday	11 a.m.
Hyannis Client Recognition	Hyannis DTA Office 181 North St. Hyannis	8/25 Monday	3 p.m.
Salem Client Recognition	Salem Five Bank Community Room 210 Essex St. Salem	8/26 Tuesday	11 a.m. – 12 p.m.
Fall River Client Recognition	Fall River Heritage State Park Davol St. Fall River	8/27 Wednesday	11 a.m. – 12 p.m.
Taunton Client Recognition	Taunton Public Library 12 Pleasant St. Taunton	8/27 Wednesday	3 p.m.
Southbridge Client Recognition	James Edwards Public Library 238 Main St. Southbridge	8/29 Friday	11 a.m.
Ashmont Farmers Market	Ashmont Red Line Stop Dorchester Ave. Boston	9/12 Friday	4 p.m.

Commissioner's Corner *(Continued from Page 2)*

Summer has also marked the beginning of some exciting enhancements to the department, including many policy changes. Earlier this month, Governor Patrick signed a Welfare Reform bill that supports the department's efforts to transition clients toward economic stability. In the coming months, we will be implementing those changes and will be working with you to help make those changes as smooth as possible.

Many of these changes were advocated for by DTA and will have a positive impact on the work that we do for our clients.

Thank you for your continued hard work for the Department and our clients!

Sincerely,

Stacey Monahan
Commissioner

If you have any comments or feedback, please feel free to contact me at Stacey.Monahan@state.ma.us.

Quality Corner

This month we will review an invalid denial or negative error.

Interim Report Received Timely

This NPA SNAP household included the 58-year-old grantee, her 64-year-old spouse and 2-year-old granddaughter. The case was certified as Annual Reporting (AR) with a certification period from September 13, 2013 to September 12, 2014. An Interim Report (IR) was sent to the client on January 27, 2014. The IR was returned by the client timely and was initiated on the Reevaluation page of BEACON. The client was mailed a *Thank You* notice on February 12, 2014 acknowledging receipt of the Interim Report. On the IR, the client indicated that there were no changes.

The NPA SNAP case closed on March 7, 2014 for failure to complete an Interim Report. Quality Control (QC) determined that this was an invalid closing or negative error because the client had, in fact, returned the IR on time.

What's a Case Manager to Do?

Case managers must process IRs and reevaluations to ensure that clients who complete their IR or recertification timely are guaranteed uninterrupted SNAP benefits. Case managers and supervisors must monitor and track timeliness when completing recertifications and IRs. There are several views and reports available to assist case managers and supervisors in prioritizing recertifications and IRs.

Case managers may use the Reevaluation Status Detail Report in Actuate, which is designed to track the status of reevaluations subject to the timely case closing process and identifies all SNAP households who have been sent a Notice of Expiration. In addition, two views — Reevaluation Due and Reevaluation Due-Interim Report listed under Daily Priority Action — are helpful in prioritizing IR and recertification processing. For more information on prioritizing SNAP recertifications and processing the Interim Reports, see Operations Memo 2011-43 and Operations Memo 2011-8A.

From the Hotline

If you have any questions on this column or other policy and procedural material, please have your Hotline designee call the **Policy Hotline at 617-348-8478**.

Q. 1.   On January 30, 2014, a Verification Checklist (VC-1) requesting proofs of my client's medical expenses was issued with a due date of February 9, 2014. On the VC-1, I listed the request for medical expenses under "Other" in the "Other Information" block on the notice. In March, 2014, the case was denied for failure to provide verifications. As an optional SNAP verification, this case should not have been denied for failure to provide verification of medical expenses. How do I prevent this?

A. 1.   To prevent this, do not list the medical expense verification request under "Other." BEACON considers "Other" a mandatory verification and will deny the case for "failure to provide." Instead, list the verification request under Medical Expenses so that BEACON will accurately recognize the verification request as optional and prevent the denial. Please refer to Operations Memo 2012-17: *TAFDC, EAEDC and SNAP – Missing Verifications* for more information on verifications. Also see the **SNAP Medical Deductions Job Aid** for more information on how to verify medical expenses.

Q. 2.   Is Massachusetts residency a SNAP verification requirement for DTA clients?

A. 2.   Yes. According to 106 CMR 362.100, there is a Massachusetts residency requirement that must be verified. When available, the same documents used to verify rent, mortgage payments, utilities or identity should also be used to verify residency. If any of these documents do not verify residency, other documents or collateral contacts that reasonably establish the applicant's residency may be used. No requirement for a specific type of verification can be imposed. See 106 CMR 362.120 for more details.

From the Forms File

Revised Form
04-085-0814-05 (English)
04-086-0814-05 (Spanish)
F&FD-1 (Rev. 8/2014)
Application for Payment of Funeral and Final Disposition

All applications for the funeral and final disposition benefit have been centralized in the Central Burial Unit (CBU) established as part of the Central Eligibility Processing (CEP) unit. The *Application for Payment of Funeral and Final Disposition* (F&FD-1) was revised due to this change. Please refer to Operations Memo 2014-54 for more information.

Training Corner

Improving Organization by Using Tasks in Outlook

To manage your daily work more efficiently, try using the Task function in Outlook. It is an easy way to keep track of the things you need to get done, and it is right at your fingertips in an application you use every day.

1. From Outlook click **New Items**.

2. Click **Task.**

3. Enter as much information as you want (Subject, Start date, Due date, Status, Priority, % Complete, Reminder). You do not have to enter information in every field, only as much as you find useful. Subject and Due date are sometimes all you need to know to manage your work.
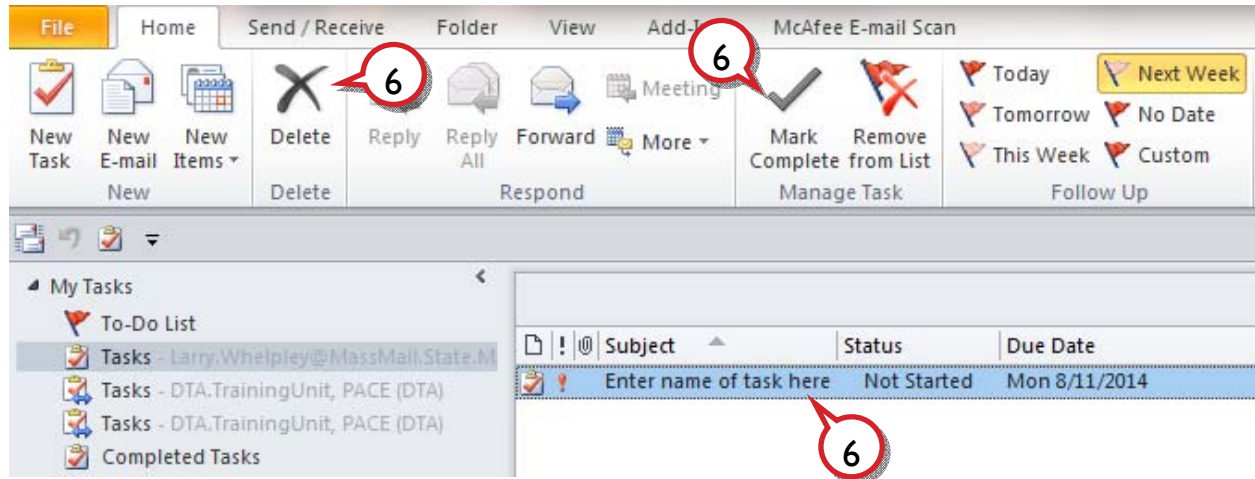
Training Corner *(Continued from Page 6)*

4. Click **Save & Close** when finished.

5. To view the list of all your tasks, click **Tasks** on the lower left hand side of Outlook.
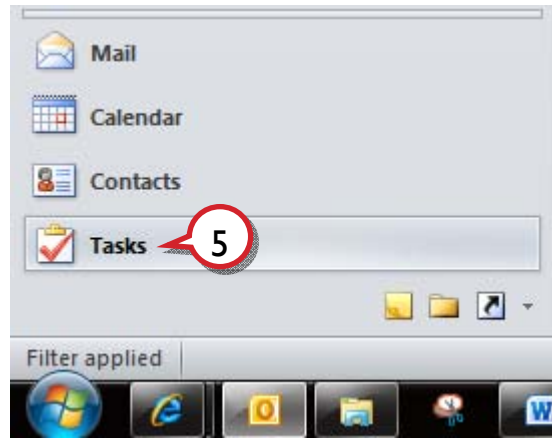
6. The list of your tasks will appear together. You have a variety of actions you can take on your task including marking the task as complete, deleting it or updating it by using the options on the menu bar.

Operations Memos

TAFDC – Automating the Learnfare Process: Changes

TAFDC

Operations Memo 2014-48

The purpose of this Operations Memo is to advise DTA staff about:

a mailing to grantees whose children do not have current school information entered on BEACON, requesting the updated information;

- new reports regarding the mailing, Learnfare Probation and other Learnfare reports;
- how to process the returned school information;
- how to treat cases when the school information is not returned;

BEACON changes;

- the automated Learnfare tracking process;
- case manager responsibilities in conjunction with the automation; and
- the Learnfare intervention project.

This Operations Memo is being reissued due to changes from welfare reform that increase the maximum age of a child subject to Learnfare from 13 to 15. This Operations Memo also introduces the addition of an Alternative School indicator on the Education page and emphasizes the importance of entering a Start Date that reflects the upcoming school year and also obsoletes Operations Memo 2013-49.

TAFDC and EAEDC – Self-Declarations and a New Form

TAFDC and EAEDC

Operations Memo 2014-49

Operations Memo 2014-49 A

As part of the recent welfare reform legislation, it is now required that all cash program self-declarations be signed under penalties of perjury. A form included with the Operations Memo may be used for this purpose and is available on Online Forms when clients wish to self-declare certain eligibility factors. The Operations Memo was reissued as Operations Memo 2014-49A to add the client APID to the form and obsolete Operations Memo 2014-49.

Operations Memos

TAFDC – Clothing Allowance

TAFDC

Operations Memo 2014-50

The Department will issue a nonrecurring clothing allowance of $150 per eligible TAFDC client under the age of 19 for September 2014. This Operations Memo advises DTA staff about the clothing allowance:

- who is eligible;
- amounts for the prorated payments for October- December;
- payment dates; and
- notices.

TAFDC: Massachusetts Office for Refugees and Immigrants (MORI) Referrals for Spanish-Speaking Refugee and Immigrant Clients in Certain TAOs

TAFDC

Operations Memo 2014-51

This Operations Memo informs case managers that Spanish-speaking refugee and immigrant TAFDC clients in certain TAOs may now be referred to Massachusetts Refugees and Immigrants (MORI) vendors for Employment Services Program services. Qualified clients should be referred through BEACON for these services.

Notices to Households Approved on Day-30

SNAP
Operations Memo 2014-53

This memo advises staff of the revision of the notice that is issued to households approved for SNAP benefits on day-30. The memo also describes a second notice that will be mailed on day-31 and the full certification period that will be assigned to the household.

Operations Memos

TAFDC, EAEDC, SNAP and SSP: Centralization of the Funeral and Final Disposition Benefit

All

Operations Memo 2014-54

The Department of Transitional Assistance (DTA) is the state agency responsible for paying funeral and final disposition expenses for:

- any person who was without sufficient resources or financially responsible relatives to pay for funeral and final disposition expenses; or
- any person whose identity is unknown and found deceased.

A maximum of $1,100.00 may be paid, provided that the total expense of the funeral and final disposition does not exceed $3,500.00. If payment is made, the Department has preferred claims for reimbursement against the decedent's estate and resources, if any exist.

Effective August 25, 2014, the Department will centralize all applications for the funeral and final disposition benefit in the Central Burial Unit (CBU) established as part of the Central Eligibility Processing (CEP) unit.

TAFDC – ESP/Work Program Requirement: BEACON Changes

TAFDC

Operations Memo 2014-55

BEACON Build 46.4 scheduled for August 25, 2014, contains changes to ESP/Work Program Requirement forms and processes.

This Operations Memo advises staff about the BEACON changes. Specifically:

- the *Participation and Attendance* (ESP-7) form changes;
- the *Referral and Response* (ESP-16-Cash) form changes;
- changes to the Hours Participated field in the TAFDC – Work Requirements page and in the Participation tab;
- the reinstitution of the automated sanction process with a Mandatory Community Service Referral; and
- limiting the length of the "Participation" Good Cause reason.

Operations Memos

TAFDC and EAEDC – Welfare Reform: Work Related Expense Change

TAFDC and EAEDC

Operations Memo 2014-56

As part of the recent welfare reform legislation, the work related expense (WRE) used in the benefit calculation for working TAFDC and EAEDC clients has changed effective with September's grants.

This Operations Memo provides staff with the new WRE for TAFDC and EAEDC. This change is effective for September grant calculations. No case manager action is required to institute the change for the work related expense.

Diversity Quote

I think diversity can also be a resource, an asset, especially in a world that is becoming globalized, to deal with difference, to deal with variety, to deal with complexity.

José Manuel Barroso

FYIs

Client APID Added to Electronic Case Folder (ECF) Landing Page

Effective with BEACON Build 46.4 scheduled for August 25, 2014, a client's Assessed Person Identification Number (APID) will appear on the ECF landing page (where DTA staff access workflows for a client's case). Since DTA is moving towards using the APID for client identification in all transactions, this APID is being added to the page as an aid for DTA staff.

Enhancements to My Account Page (MAP)

Beginning in August 2014, email addresses provided by clients who register for MAP and opt in to eNotification will be displayed on their MAP home page. The page will also display a statement confirming that the client has opted into eNotification at the email address shown. The email address information is imported from the BEACON Electronic Case File (ECF) Email page into MAP once the case manager clicks on the eNotification opt-in radio button. The email address of clients who are not enrolled in eNotification will not display. For instructions on entering the email address on BEACON and enrolling clients in eNotification, see *Operations Memo 2014-41: TAFDC, EAEDC, and SNAP: Implementation of eNotification.*

FYIs

Interview Wrapup Edit for Duplicate Benefits

In the September 2013 FNS Review of cases that received multiple SNAP issuances in the month of May 2013, FNS cited cases in which the case manager incorrectly authorized two issuances for the same amount. FNS recommended a warning edit be put on BEACON to alert the case manager and supervisor that two identical benefits are about to be approved.

Effective with BEACON Build 46.4 scheduled for August 25, 2014, the following edits on the Interview Wrapup page will occur for all types of related benefit authorizations:

The first edit will occur when:

- In the last 60 days, the same type of Related Benefit has been saved on the page (and has not been cancelled) or released (either case manager entered or created in batch) and
- The amount of the Related Benefit being saved is within $10.00 (plus or minus) of the existing Related Benefit(s).

    The warning edit will read:
    "A Related Benefit with the same type and approximate amount already exists. Do you want to add another Related Benefit similar to the one already requested or released?
        If Yes, proceed with save.
        If No, return to page."

The second edit will occur when:

selecting the Authorization button for any Request that contains a Related Benefit and there are multiple Related Benefits requested (and none have been cancelled) or released with the same type and approximate amount (plus or minus $10) in the last 60 days.

The warning edit will read:
"A Related Benefit with the same type and approximate amount was requested or issued in the last 60 days. If this additional Related Benefit is not appropriate, return to the Related Benefits page to cancel the Related Benefit request."

The case manager and supervisor must then review the related benefits being issued to ensure the correct related benefit is being given before going back into the Interview Wrapup page to authorize the correct related benefit(s).

FYIs

Link for Mass 2-1-1 in BEACON

Effective with BEACON Build 46.4 scheduled for August 25, 2014, a new link has been added to the Useful Links section of the BEACON Home page: Mass 2-1-1 Search. DTA staff can click on this link to access appropriate local resources for their applicants or clients. Clicking on the link will bring staff to the Mass 2-1-1 Search Page.

Online SNAP Applications Received after Close of Business

Currently when an online SNAP application is received after close of business on a work day, or on a Saturday, Sunday or Holiday, the date of application is that calendar day. A BEACON change will be implemented on Tuesday, August 26, 2014 to count the next business day as the date of application for online applications received after close of business or received on weekends and holidays. This aligns with existing information on the Virtual Gateway SNAP application.

TAO Meeting Notes