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From the Commissioner

Dear Colleagues:

I am writing to you to discuss two important issues: case re-certifications/re-evaluations and office security.

Re-certifications and Re-evaluations

As you know, the demand for our services has increased dramatically over the last several years. Currently, over 778,000 individuals – or 1 in 9 residents of Massachusetts – now receive benefits through the Supplemental Nutrition Assistance Program (SNAP). More than 50,000 receive Transitional Aid to Families with Dependent Children (TAFDC) and nearly 22,000 receive Emergency Aid to the Elderly, Disabled and Children (EAEDC). With rising caseloads and diminished resources, we have experienced challenges with completing timely re-certifications and re-evaluations. As a result, the number of overdue re-certifications and re-evaluations continues to grow to an increasingly critical level.

In order to catch up on overdue SNAP re-certifications and cash re-evaluations, we have worked with Transitional Assistance Office (TAO) Directors to develop a plan. This plan includes temporarily reassigning staff to address these overdue re-certifications and re-evaluations and offering overtime to BERS staff and clerks for a limited period. Overtime will begin on Monday, November 29th and will continue for approximately four to six weeks, depending upon available funding. During these weeks, BEACON 3.0 will be available between the hours of 7:00am – 7:00pm.

If you are interested in volunteering for overtime, please let your manager know how many additional hours you are willing to work. Overtime will be approved on an equitable basis in accordance with the respective collective bargaining agreements. If there are limitations due to available funding, seniority will be the determining factor. Your manager will let you know about procedures for requesting and reporting overtime hours.

(Continued on page 2)

From the Commissioner *(Continued from page 1)*

Office Security

As I have met with you during office visits throughout the year, many of you have expressed concerns about office security and the need for security guards. I am pleased to report that we have completed our security assessment and we will be adding security guards to the following offices during December 2010 and January 2011:

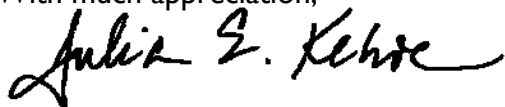
- Brockton
- Fall River
- Fitchburg
- Holyoke
- Hyannis
- Lowell
- Malden
- New Bedford
- Revere
- Taunton

The following offices already have security guards, and we will be continuing their presence:

- Dudley Square
- Lawrence
- Newmarket Square
- North Shore
- Springfield Liberty
- Springfield State
- Worcester

I hope this information is helpful. Thank you as always for everything you do to serve the low-income individuals and families of the Commonwealth.

With much appreciation,



Julia E. Kehoe
Commissioner

Quality Corner

This month we will review two errors that occurred in Non Public Assistance (NPA) SNAP cases. The first error is related to an expedited issuance while the second error is related to unreported RSDI income.

Counting Income for an Expedited Benefit Calculation

The first case is a NPA case that includes a 42-year-old client and two children, ages 17 and 8. At application, the client indicated that she received \$918 per month in child support payments and that her mortgage and utility expenses equaled \$2426 per month. Based on this information, the client was entitled to expedited benefits in the review month.

The case manager processed the expedited benefits, issuing maximum SNAP benefits for a household of three in the amount of \$526 for the review month. QC determined that the case manager did not use the child support income in the calculation of the expedited benefit amount. This caused an overpayment error of \$94 for the review month.

What's a Case Manager to Do?

The Quality Control Unit has indicated that in recent months they have found more than one case in which the case manager did not use child support income in the calculation of the expedited benefit amount.

In accordance with 106 CMR 365.840, Determining Eligibility and Benefit Level for Expedited Service Households, *all income received or reasonably expected to be received in the month of application must be considered when determining eligibility and benefit level.* Case managers must be careful to appropriately count income received by the client, as outlined above, when calculating SNAP benefits for expedited cases.

Pending Income from Social Security

The second case includes a 56-year-old man with no children. He applied for SNAP benefits on July 23, 2010 and the case was certified as a change reporting case for the period July 5, 2010 through July 4, 2011. On the application, the client reported that he lived with his daughter but that he purchased and prepared food separately. He also reported that he was responsible to pay rent of \$300 per month, which included utilities, and that he was waiting for the approval of SSI benefits.

QC determined through a SVES inquiry that the client had been receiving RSDI since January 2009 in the amount of \$843 per month. Using the RSDI amount in the SNAP benefit calculation, the client was only eligible for \$16 per month in benefits. The client had received SNAP benefits of \$80 in the review month. This resulted in an overpayment error of \$64 for the review month.

What's a Case Manager to Do?

This was an avoidable error. The client should have reported his correct income, but since the pending income was reported as being from the Social Security Administration (SSA), the case manager should have checked BENDEX/SDX or performed a SVES inquiry. If this inquiry yielded no results, the client should have been asked to provide a letter from SSA regarding his pending claim. Case managers must always follow-up to confirm the status of pending income.

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.** A funeral director has sent us a completed *Application for Payment of Funeral and Final Disposition*. The application indicates that there was a prepaid burial agreement in the decedent's name totaling \$1,000. Is this funeral director entitled to a benefit from DTA if the total cost of the funeral and burial is \$3,400?
- A.** Yes. The Department can pay up to \$1,100 for funeral and final disposition payments. As long as there are no other available resources to be deducted and all of the other requirements for this benefit are met, this funeral director is entitled to a \$100 payment. See Field Operations Memo 2010-54 for more information.
- Q.** We received an *Application for Payment of Funeral and Final Disposition* from the parent of a deceased nineteen-year-old. The application indicates that the parent has \$3,000 in a savings account. This savings account balance is the only reported available resource. The bill attached to the application shows that the funeral and cremation charge will total \$4,200. Since there are \$3,000 in savings reported and the Department can only pay up to \$1,100 after available resources are deducted, should I deny this application?
- A.** No. This single, nineteen-year-old, has no financially responsible relatives. Parents are not financially responsible for their adult children and this decedent was unmarried. If the decedent had no other available assets and the decedent's circumstances meet all of the other requirements at 106 CMR 705.700, then the full \$1,100 payment may be approved.
- Q.** Yesterday our TAO received an *Application for Payment of Funeral and Final Disposition* from one of our local funeral directors. In reading the application, I recognized the decedent's name because his surviving spouse lives in my condominium building. About a month ago, this surviving spouse mentioned to me that she was recently separated from her husband, and then further explained that she was still legally married. Since this means that my neighbor is a financially responsible relative, should I make contact with her to determine the amount of her available resources?
- A.** No. In this situation, contact the funeral director and explain to him that the person completing the *Application for Payment of Funeral and Final Disposition* must be a spouse or next of kin, unless none is available. (This information is printed on the application.) As long as the next of kin is known, he or she should complete the application. The funeral director, in this situation, may contact the spouse and request that she complete the application. If the spouse wants to make an application, any available resources owned by the decedent or recently separated spouse must be reported. The Department may pay the balance of the funeral and final disposition costs, up to \$1,100.



From the Forms File

New Form

04-100-1110-05

04-101-1110-05(S)

AP-SSI-IAR (11/2010)

Authorization for Reimbursement of Interim Assistance Initial Claim or Posteligibility Case

The *Authorization for Reimbursement of Interim Assistance Initial Claim or Posteligibility Case*

(AP-SSI-IAR) form is used to authorize DTA reimbursement from initial SSI claims and SSI posteligibility cases. Refer to Operations Memo 2010-53 for more information.

Revised Form

02-008-1110-05

DORL-1 (Rev. 11/2010)

Request for Employment Information

The *Request for Employment Information* (DORL-1) form has been revised and is available in the *Online Forms* section of *Policy Online*. Refer to Operations Memo 2010-56 for more information.

Obsolete Forms

04-002-0902-05

04-009-0902-05 (S)

Authorization for Interim Assistance Reimbursement (IAR) (Initial SSI Claim)

04-300-0302-05

04-301-0302-05 (S)

Authorization for Interim Assistance Reimbursement (IAR) (Reinstated SSI)

These two forms are now obsolete. Please discard all supplies of the AP-SSI-I and the AP-SSI-IA forms and use the new AP-SSI-IAR form. Refer to Operations Memo 2010-53 for more information.

Diversity Quote

“We all should know that diversity makes for a rich tapestry, and we must understand that all the threads of the tapestry are equal in value no matter what their color.”

Maya Angelou



Operations Memos

EAEDC: New Interim Assistance Reimbursement Agreement and New Authorization for Reimbursement of Interim Assistance (AP-SSI-IAR) Form

EAEDC

Operations Memo 2010-53

Effective November 20, 2010, DTA and the Social Security Administration (SSA) implemented a new interim reimbursement agreement. As with the old agreement, SSA will reimburse DTA for some or all of EAEDC benefits paid to a client while SSA determines if the individual is eligible for SSI benefits. A new client authorization form, *Authorization for Reimbursement of Interim Assistance Initial Claim or Posteligibility Case* (AP-SSI-IAR), has been jointly created by representatives from DTA and SSA.

This memo:

- introduces the *Authorization for Reimbursement of Interim Assistance Initial Claim or Posteligibility Case* (AP-SSI-IAR) form;
- explains the AP-SSI-IAR form as it applies to initial SSI claims and SSI posteligibility cases (suspended or terminated SSI cases); and
- describes case managers' responsibilities for processing the AP-SSI-IAR form.

Funeral and Final Disposition Payment Changes

TAFDC and EAEDC

Operations Memo 2010-54

The FY '11 State Budget authorized changes to the Department's administration of funeral and burial payments, one of which was a change in terminology to funeral and final disposition payments.

This memo advises staff how to process funeral and final disposition expenses under these guidelines. It is being reissued to correct information about when to establish a decedent on BEACON: a client known to FMCS (even if closed) does not need to be established on BEACON for the Department to pay the funeral and final disposition expense.

Operations Memos

Verification

All

Operations Memo 2010-55

In an effort to streamline the verification process and simplify case managers' efforts to assist clients who are experiencing economic hardship, the Department has issued this Operations Memo. The purpose of this memo is to advise case managers about:

- permanent verifications;
- avoiding “over-verification”;
- when to ask for verifications;
- alternative verifications;
- optional verifications for SNAP; and
- providing assistance in obtaining verifications.

Access to the Work Number

All

Operations Memo 2010-56

This memo informs local office staff that, as of December 1, 2010, access to the Work Number will be unavailable because a fee is now required for employment verifications. The memo suggests interim methods for obtaining employment information to be used while the Department explores other options for verification of employment and wages. Field Operations Memo 2007-3: The Work Number is now obsolete.

Operations Memos

Globe Santa Mailing – Update for Clients Living in Lowell, Lawrence and Haverhill

All

Operations Memo 2010-57

This year's Globe Santa mailing took place on October 12th and November 15th. The "Boston Globe Santa – Holiday Gift Verification Notice" was sent to active TAFDC, EAEDC, and SNAP clients who live in the Globe Santa geographical area. The mailing included an informational notice about the Globe Santa Program and a verification notice.

This memo is being issued to provide updated information about the Globe Santa mailing to clients living in Lowell, Lawrence and Haverhill.

FYI

Expedited Issuance of SNAP Benefits

Expedited SNAP benefits can be issued to a household at initial certification and at recertification, provided the household meets the requirements of SNAP at 106 CMR 365.810 and has completed any verification requirements that were postponed at the last issuance of expedited benefits. However, if a case has been closed for a year or more, even if the household had previously failed to provide verifications, expedited benefits can be issued.

Expedited SNAP benefits are meant to be issued to households with little or no income or assets. The rationale behind postponing the verification process is to ensure that a household does not go without food for an extended period of time while continued eligibility is being determined. To receive an expedited issuance, the only verification requirement is the verification of identity for the grantee. Also, any income the household receives must be counted in the expedited determination.

TAO Meeting Notes