Field Operations Memo 2001-26 A
May 17, 2001

To: **Transitional Assistance Office Directors**

From: **Cescia Derderian, Acting Assistant Commissioner for Field Operations**

Re: **BEACON Release 2.0 Pre-Conversion Procedures**

Overview

On June 21, 2001, BEACON Release 2.0 will be in production statewide. Procedures for this statewide implementation will be issued in three Field Operations Memos.

This is the first of the three memos. It consists of the pre-conversion activities which begin on May 21, 2001 and must, **whenever possible**, be completed before conversion begins at the close of business on June 14, 2001.

The two additional memos in this series will be issued explaining to TAO Staff:

* BEACON Release 2.0 Conversion Procedures; and

* BEACON Release 2.0 Post-Conversion Procedures.

Purpose of Memo

This memo informs TAO staff about the procedures for pre-conversion activities. Pre-Conversion actions include:

* continuing activities outlined in the BEACON Release 2.0 Pilot Activities Phase IV Field Operations Memo 2001-21;

* approving or denying pending applications/reapplications;

Purpose of Memo (continued)

- completing ongoing AU maintenance transactions;

- tracking all activities that cannot be entered by June 14, 2001 using the *Pre-Conversion Tracking* form (see Attachment A);

- entering residential facilities on BEACON Release 1.0 which will be converted to BEACON Release 2.0 and after conversion entering the corresponding information on Residential tab in BEACON Release 2.0;

- not entering Monthly Reporting codes (MSRE) or Monthly Reporting income changes in PACES for the June Report Month; and

- not scheduling cash reevaluations for the months of June and July.

Conversion Overview

Conversion of all PACES, FMCS, BEACON Release 1.0 and PRISM information will take place from the close of business on June 14, 2001 through June 20, 2001. BEACON will convert all case data as they exist at close of business on June 14, 2001 for each system.

During conversion, information cannot be data-entered on PACES, PRISM, ARTS, BEACON Release 1.0 and BEACON Release 2.0. **Therefore, it is essential that all changes and updates to any of these systems be data-entered by the close of business on June 14, 2001.**

On June 21, 2001, the following systems will be in production:

- BEACON Release 2.0;

- the DTA version of FMCS for Categories 2, 4 and 9 only;

- the DMA version of FMCS for Categories 0, 1, 3, 5, 6, 7, and 8 only; and

- the DMA version of PACES/FMCS at Regional SSI TAOs.

Important: The use of DTA PACES, PRISM, ARTS and BEACON Release 1.0 will be shut down at the close of business on June 14, 2001 and will not return to production.

Benefit Issuance

Cash benefits and food stamp benefits for June will be available for recipients. To ensure the timely release of these benefits, the Release Dates within the conversion period have been changed. See the revised *Case Closing and Reduction Schedule for* June in Attachment B.

Pending Applications and Reapplications

AU Managers must, whenever possible, approve or deny all pending applications on **PACES** by the close of business on June 14, 2001.

Beginning May 17, 2001 when completing an Application/Reapplication the AU Manager must:

- inform the applicant that the Department is upgrading the computer systems;

- direct the applicant to make every effort to return verifications by June 8, 2001 so the AU can be processed on PACES, ARTS, PRISM and BEACON Release 1.0 by close of business June 14, 2001 to prevent a delay in benefits; and

- explain that verifications returned after June 14, 2001 will be entered once the system is upgraded and, if the applicant is eligible, benefits will be issued as soon as possible after June 21, 2001, retroactive to the initial eligibility date.

To prepare for conversion:

- A list of all pending cash and food stamp applications must be generated in each TAO as of Wednesday, June 6, 2001 and Wednesday, June 13, 2001.

- AU Managers must review each pending AU listed. If needed verifications have been returned, process the AU on PACES, ARTS, .PRISM AND BEACON Release 1.0 by the close of business June 14, 2001 to ensure receipt of benefits within the required timeframes and accurate tracking on ARTS; and

    Important: For food stamp applications AU Managers must check to see if the food stamp AU will reach day 7 or day 30 during conversion. If so, the AU Manager must:

    - contact the applicant to find out the status of the outstanding verifications; and

Pending Applications and Reapplications (continued)

- if eligible, process the AU or expedited benefits on PACES on or before close of business June 14, 2001 to ensure receipt of benefits within the required timeframes.

- PIDs and Worksheets given to data entry to key on or before close of business on June 14, 2001 must be monitored by supervisors to ensure successful entry on PACES, ARTS, PRISM AND BEACON Release 1.0. If data entry documents to approve or deny an AU were rejected, the AU must be tracked and entered on BEACON on or after June 21, 2001. This process will be explained in the *BEACON Release 2.0 Conversion Procedures* memo.

On June 14, 2001, a final list of all pending cash and food stamp applications must be generated in TAOs for all AU Managers, who should highlight all pending applications that could not be approved or denied on PACES by the close of business on June 14, 2001. These pending applications must be approved or denied on BEACON on or after June 21, 2001.

Ongoing AUs

AU ACTIVITIES NOT SUBJECT TO THE 10-DAY PENDING PERIOD

AU activities must, whenever possible, be entered on PACES by the close of business on June 14, 2001. If the transaction cannot be entered by the June 14, 2001 cutoff, AU Managers must track the transaction using the *Pre-Conversion Tracking* form (see Attachment A) and enter it on or after June 21, 2001.

AU ACTIVITIES SUBJECT TO THE 10-DAY PENDING PERIOD

Pending transactions must, whenever possible, be entered on PACES to release before the close of business June 14, 2001. Pending transactions that do not release on or before June 14, 2001 will not be converted to BEACON. The last release date for all SSNs in the first cycle is June 11, 2001 and for the second cycle SSNs ending in 0 through 4 will release by the close of business on June 14, 2001. See the revised *AU Closing and Reduction Schedule* in Attachment B for June and July release dates.

Ongoing AUs (continued)

All pending transactions entered on PACES that are not released by the close of business on June 14, 2001 will be tracked on the *PACES Cases Pending Report*. The report will be available through ViewDirect. Transactions entered June 8, 2001 through June 14, 2001 will generate the PACES notice informing recipients of the change in their cash benefit and/or their food stamp benefit. These pending transactions will not convert to BEACON. AU Managers must enter these transactions on BEACON on or after June 21, 2001 following procedures outlined in the *BEACON Release 2.0 Post-Conversion Memo*.

PACES PENDING APPEALS

Appeals that are pending on PACES at the time of conversion will not convert to BEACON. AU Managers should keep the copy of the *PACES Cases Pending Report* which was generated on June 14, 2001, as instructed above, to track AUs that have a pending appeal. The Central Office Division of Hearings will maintain a master list of all pending appeals that appear on PACES at the close of business on June 14, 2001. No further action is needed by the AU Manager until an actual appeal decision is made. These procedures are outlined in the *BEACON Release 2.0 Post-Conversion* memo.

MONTHLY REPORTING AUs

For all recipients subject to Monthly Reporting, the Issuance/Monthly Reporting chart for June has been revised. Release dates within the conversion period have been changed. See Attachment C for the revised chart.

The following changes have been made to Monthly Reporting procedures for the June Report Month.

- AU Managers must not enter any income data and data entry clerks must not enter any Monthly Reporting codes (MSRE) for returned Monthly Reports in the June Report Month on PACES. MSRE codes or income data for these AUs must be held and entered on BEACON on or after June 21, 2001 in accordance with procedures outlined in the *BEACON Release 2.0 Post-Conversion* memo.

**Ongoing AUs
(continued)**

Note: All other changes that result in an immediate release that were requested on the Monthly Report, such as an address change or household size, can be entered on PACES until conversion begins on June 14, 2001 at close of business.

- BEACON Release 2.0 will be triggered to look as if it sent the First Monthly Report for June.

    Note: The first Monthly Report will be sent from PACES in June.

- The second June Monthly Report will not be issued. Monthly Reporting AUs will not be adversely affected for not complying with the Monthly Reporting requirements for June. Monthly Reporting AUs will not be harmed for failing to return a Monthly Report, returning an inadequate Monthly Report or an incomplete Monthly Report.

- The "Monthly Report Status" View on BEACON Release 2.0 will list all AUs subject to monthly reporting for June. For procedures to process Monthly Reports see *A User's Guide, Transitional Assistance Programs and BEACON, Chapter XVI, Section F.*

ESP AUs RECEIVING PARTICIPATION REPORTS

For ESP AUs receiving participation reports, the following applies:

- May participation reports will be sent for June data-entry from BEACON Release 1.0;

- all participation data must be entered in BEACON Release 1.0 by the close of business on June 14, 2001. ESP AUs will not be harmed for failing to return a participation report during the conversion month; and

- participation reports will be sent for July from BEACON Release 2.0.

**Entering
Residential
Facilities**

Residential Facilities not currently in BEACON Release 1.0 must be entered on BEACON Release 1.0 before conversion. Residential Facilities entered on BEACON Release 1.0 by close of business June 14, 2001 will be converted.

Using BEACON Release 1.0, add new Resources following existing procedures (i.e., the Resource Coordinator would establish an organization first, then add the new Resource). In addition to the usual procedures, the Resource Coordinator will:

- Access the Organization Search window by clicking on the Organization Search Folder:

  - from the "Type" dropdown box select "Housing"; and

  - leave "Program Type" blank.

- Access the Resource Search window by clicking on the Resource Search Folder:

  - click on the General Services radio button;

  Note: The "General Service" dropdown box will automatically default to "Domestic Violence."

  - from the "General Services" dropdown box change the default from "Domestic Violence" to "Housing"; and

  - leave "Program" blank.

Once Conversion is completed, the additional Residential Facilities information (i.e., daily rate, meals provided, etc.) must be added to the Residential Facility tab in the Resource folder on BEACON Release 2.0. This information will be stored in Release 2.0 so that it will not be necessary to reenter the Residential Facility information after each additional conversion.

Note: Residential Facilities must be added in Release 1.0 until conversion begins at the close of business on June 14, 2001. If a new Resource is added in the BEACON Release 2.0 Pilot environment, the Resource will not convert.

Residential Facilities not added in Release 1.0 by close of business on June 14, 2001, must be added on BEACON 2.0.

Reevaluations   AU Managers must not schedule any cash benefit reevaluations for the months of June and July. This allows AU Managers more time for the number of AU activities that must be completed during conversion and post-conversion.

Important: During the months of June and July, AU Managers must continue to perform:

- reevaluations for NPA FS AUs since these AUs will be closed by the timely AU closing process if not recertified for June and July;

- reviewing AUs listed on monthly Income Expense Reports;

- exit conferences for AUs that reach month 22 of their time-limited benefits; and

- monthly reviews for TAFDC approved extension AUs.

Questions   BEACON-related questions should be called in by the Implementation Manager to the Customer Service Center at (617) 348-5290.

Pre-Conversion Tracking form

Date	AU SSN	AU Name	AU Activity Needed

AU Closing and Reduction Schedule

Key Date: last date a transaction can be entered to pend for a negative action

Release Date: date that the transaction is released

Benefit Date: date any cash benefit is available

Closing Date: date that the case is closed

Second Cycle June 2001

SSN	0	1	2	3	4	5*	6*	7*	8*	9*
Key Date	06/01	06/01	06/04	**06/04**	**06/04**	06/08	06/08	06/11	**06/14**	**06/14**
Release Date	06/13	06/13	06/14	**06/14**	**06/14**	**06/21**	**06/21**	06/21	06/25	06/26
Benefit Date	06/16	06/16	06/19	06/20	**06/20**	06/23	06/25	**06/25**	06/28	06/29
Closing Date	06/15	06/16	06/18	06/19	06/21	06/22	06/24	06/25	06/27	06/28

First Cycle July 2001

SSN	0*	1*	2*	3*	4	5	6	7	8	9
Key Date	**06/14**	**06/14**	**06/14**	**06/14**	06/22	06/22	06/25	06/26	06/29	06/29
Release Date	06/27	06/27	06/28	06/29	07/03	07/03	07/05	07/06	07/10	07/10
Benefit Date	06/30	07/02	07/03	07/05	07/07	07/07	07/10	07/11	07/13	07/14
Closing Date	06/30	07/01	07/03	07/04	07/06	07/07	07/09	07/10	07/12	07/13

* These transactions will not release by the close of business on June 14, 2001. AU Managers must enter these transactions on BEACON on or after June 21, 2001 following procedures outlined in the BEACON Release 2.0 Post-Conversion Memo.

Case Processing — Second Quarter

Cases Participating in the Monthly Reporting Cycle Schedule for June 2001 Payment

	SSN	0	1	2	3	4	5	6	7	8	9
Budget Month	From	04/01	04/02	04/04	04/05	04/07	04/08	04/10	04/11	04/13	04/14
	To	04/30	05/01	05/03	05/04	05/06	05/07	05/09	05/10	05/12	05/13
Week Ending Dates	1st	04/07	04/07	04/07	04/07	04/07	04/14	04/14	04/14	04/14	04/14
for MR Cases*	2nd	04/14	04/14	04/14	04/14	04/14	04/21	04/21	04/21	04/21	04/21
	3rd	04/21	04/21	04/21	04/21	04/21	04/28	04/28	04/28	04/28	04/28
	4th	04/28	04/28	04/28	04/28	04/28	05/05	05/05	05/05	05/05	05/05
**Possible Suspend	5th					05/05				05/12	05/12
Report Month	From	05/01	05/02	05/04	05/05	05/07	05/08	05/10	05/11	05/13	05/14
	To	05/31	06/01	06/03	06/04	06/06	06/07	06/09	06/10	06/12	06/13
Payment Month	From	06/01	06/02	06/04	06/05	06/07	06/08	06/10	06/11	06/13	06/14
	To	06/30	07/01	07/03	07/04	07/06	07/07	07/09	07/10	07/12	07/13
**** 1st Payment		06/01	06/02	06/04	06/05	06/07	06/08	06/09	06/11	06/13	06/14
Case Maint Update		06/13	06/13	06/14	06/14	06/14	06/21	06/21	06/21	06/25	06/26
2nd Payment		06/16	06/16	06/19	06/20	06/20	06/23	06/25	06/25	06/28	06/29

* Enter income **received** in these weeks

** Possible Suspension of Benefits in the Payment Month

**** 1st Benefit Issue Date