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Executive Office of Health and Human Services
Department of Transitional Assistance
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Field Operations Memo 2001-32 A
July 23, 2001

To: Transitional Assistance Office Staff

From: Steve Kane, Acting Assistant Commissioner for Field Operations

Re: BEACON Release 2.0 Pre-Conversion Procedures

Overview

On August 14, 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 July 23, 2001 and must, **whenever possible,** be completed before conversion begins at close of business August 9, 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 activities 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 August 9, 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 the Residential tab in BEACON Release 2.0;

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

- not scheduling cash reevaluations for the months of August and September.

Conversion Overview

Conversion of all PACES, FMCS, BEACON Release 1.0 and PRISM information will take place from the close of business on August 9, 2001 through August 13, 2001. BEACON will convert all case data as they exist at close of business on August 9, 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 August 9, 2001.**

On August 14, 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 August 9, 2001 and will not return to production.

Benefit Issuance   Cash benefits and food stamp benefits for August 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 *AU Closing and Reduction Schedule* for August in Attachment B.

Pending Applications and Reapplications   AU Managers must, whenever possible, approve or deny all pending applications on **PACES** by close of business August 9, 2001.

Beginning July 23, 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 August 3, 2001 so the AU can be processed on PACES, ARTS, PRISM and BEACON Release 1.0 by close of business August 9, 2001 to prevent a delay in benefits; and

- explain that verifications returned after August 9, 2001 will be entered once the system is upgraded and, if the applicant is eligible, benefits will be issued as soon as possible after August 14, 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, August 1, 2001 and Wednesday, August 8, 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 August 9, 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 August 9, 2001 to ensure receipt of benefits within the required timeframes.

- If data-entry documents to approve or deny an AU were rejected, the AU must be tracked and entered on BEACON on or after August 14, 2001. This process will be explained in the *BEACON Release 2.0 Post-Conversion Procedures* memo.

All pending applications that could not be approved or denied on PACES by close of business August 9, 2001 will be listed on BEACON's *Pending Application* View on August 14, 2001. These pending applications must be approved or denied on BEACON on or after August 14, 2001.

Ongoing AUs

AU ACTIVITIES NOT SUBJECT TO THE 10-DAY PENDING PERIOD

AU activities must, whenever possible, be entered on PACES by close of business August 9, 2001. If the transaction cannot be entered by the August 9, 2001 cutoff, AU Managers must track the transaction using the *Pre-Conversion Tracking* form (see Attachment A) and enter it on or after August 14, 2001.

AU ACTIVITIES SUBJECT TO THE 10-DAY PENDING PERIOD

Pending transactions must, whenever possible, be entered on PACES to release before close of business August 9, 2001. Pending transactions that do not release on or before August 9, 2001 will not be converted to BEACON. See the revised *AU Closing and Reduction Schedule* in Attachment B for August release dates.

All pending transactions entered on PACES that are not released by the close of business on August 9, 2001 will be tracked on the *PACES Cases Pending Report*. The report will be available through ViewDirect and must be printed on August 9, 2001.

**Ongoing AUs
(continued)**

Transactions entered on PACES on or before August 9, 2001 that will not release by close of business August 9, 2001 will generate the PACES notice informing recipients of the change in their cash benefit and/or their food stamp benefit. AU Managers must enter these transactions on BEACON on or after August 14, 2001 following procedures outlined in the *BEACON Release 2.0 Post-Conversion Memo*.

Note: If a transaction cannot be entered on PACES by the August 9, 2001 cutoff, AU Managers must track the transaction using the *Pre-Conversion Tracking* form (see Attachment A) and enter it on or after August 14, 2001.

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 August 9, 2001, as instructed under *AU Activities Subject to the 10-day Pending Period*, 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 close of business August 9, 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 *AU Processing - Third Quarter* chart for August 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 August 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 for the August Report Month on PACES. MSRE codes or income data for these AUs must be held and entered on BEACON on or after August 14, 2001 in accordance with procedures outlined in the *BEACON Release 2.0 Post-Conversion* memo.

Ongoing AUs (continued)

Note: All other changes resulting 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 at close of business August 9, 2001.

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

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

- The second August Monthly Report will not be issued. Monthly Reporting AUs will not be adversely affected for not complying with the Monthly Reporting requirements for August. 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 August. 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:

- July participation reports will be sent for August data entry from BEACON Release 1.0;

- all participation data returned before August 9, 2001 must be entered in BEACON Release 1.0 by August 9, 2001. All participation data returned after August 9, 2001 must be entered in BEACON Release 2.0 on or after August 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 August 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 August 9, 2001 will be converted. 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. See instructions for entering resources in *BEACON Today*, Issue 16 and *A User's Guide: Transitional Assistance Programs and BEACON*, Chapter II, Section F*K*

Note: Residential Facilities must be added in Release 1.0 until conversion begins at close of business August 9, 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 August 9, 2001, must be added on BEACON 2.0.

Reevaluations

AU Managers must not schedule any cash benefit reevaluations for the months of August and September. 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 August and September, 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 August and September;

- review of 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 Manager's Name _____

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 AU is closed

Second Cycle August 2001

SSN	0	1	2	3	4	5	6	7	8	9
Key Date	08/03	08/03	08/03	08/03	08/07	08/09	08/09	08/09	08/09	08/14
Release Date	08/15	08/15	08/16	08/17	08/20	08/20	08/22	08/22	08/23	08/24
Benefit Date	08/16	08/17	08/18	08/20	08/22	08/23	08/25	08/25	08/28	08/29
Closing Date	08/15	08/16	08/18	08/19	08/21	08/22	08/24	08/25	08/27	08/28

AU Processing   Third Quarter

AUs Participating in the Monthly Reporting Cycle Schedule
for August 2001 Payment

	SSN	0	1	2	3	4	5	6	7	8	9
Budget 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
Week Ending Dates	1st	06/02	06/02	06/09	06/09	06/09	06/09	06/16	06/16	06/16	06/16
for MR AUs*	2nd	06/09	06/09	06/16	06/16	06/16	06/16	06/23	06/23	06/23	06/23
	3rd	06/16	06/16	06/23	06/23	06/23	06/23	06/30	06/30	06/30	06/30
	4th	06/23	06/23	06/30	06/30	06/30	06/30	07/07	07/07	07/07	07/07
** Possible Suspend	5th	06/30	06/30	———			07/07	———			
Report Month	From	07/01	07/02	07/04	07/05	07/07	07/08	07/10	07/11	07/13	07/14
	To	07/31	08/01	08/03	08/04	08/06	08/07	08/09	08/10	08/12	08/13
Payment Month	From	08/01	08/02	08/04	08/05	08/07	08/08	08/10	08/11	08/13	08/14
	To	08/31	09/01	09/03	09/04	09/06	09/07	09/09	09/10	09/12	09/13
**** 1st Payment		08/01	08/02	08/04	08/04	08/07	08/08	08/10	08/11	08/13	08/14
AU Maint Update		08/15	08/15	08/16	08/17	08/20	08/20	08/22	08/22	08/23	08/24
2nd Payment		08/16	08/17	08/18	08/20	08/22	08/23	08/25	08/25	08/28	08/29

* Enter income received in these weeks

** Possible Suspension of Benefits in the Payment Month

**** 1st Benefit Issue Date