Transitions

November 2010

INSIDE THIS ISSUE:

From the Commissioner

Dear Colleagues,

In light of recent news articles, I wanted to take this opportunity to let you know how much I value the work you do every day. With rising demand for our services and limited resources, I know the pressure you are under, and I know that negative media attention never helps. As you know, the vast majority of people who receive assistance do not misuse their benefits, and are struggling every day to make ends meet. They need a degree of flexibility in order to meet their basic needs such as rent, transportation, clothing, and cleaning supplies. We are committed to helping these families to re-enter the workforce, move off of assistance, and become economically self-sufficient. We continue to strive to meet our mission to assist low-income individuals and families to meet their basic needs, increase their incomes, and improve their quality of life.

To assist us with meeting this mission, we have been working to establish local office Advisory Boards. An excellent opportunity for civic engagement, advisory boards are a great way to establish an ongoing dialogue with each of the communities we serve, and will be a critical resource for feedback, suggestions, and assistance.

Our local office Directors, Regional Directors, and our Outreach Specialist Janice McKittrick have spent countless hours recruiting committed, diverse members for each board including current and former clients, community nonprofits, other state agencies, municipalities, hospitals, local employers, and more. Applications are then reviewed by me, by Dr. Judyann Bigby, Secretary of the Executive Office of Health and Human Services, and by the Governor's Office. Once selected, members are appointed for three-year terms. They serve in a volunteer capacity and in the interest of the citizens of the region; provide advice on the overall needs and resources of the local office service area; and work to strengthen and develop relationships between the local office and the public.

(Continued on page 2)

From the Commissioner *(Continued from page 1)*

I am pleased to report that we have recently launched our boards in Boston, the Cape and Islands, Greenfield, Lowell, and Worcester. These initial meetings were very successful, and board members are excited to assist our Department. In the coming weeks, we will hold kickoff meetings for boards in Springfield, Taunton, and Revere. We hope to launch our remaining boards later this fall or early this winter. To view our notices of upcoming meetings, please visit http://www.mass.gov/dta/openmeetingnotices.

One of our challenges throughout this process has been the recruitment of current and former clients. If you know of any clients who might be interested in serving on an advisory board, please contact Janice McKittrick at 617-348-5833. A strong client presence on each board will help us to dispel the myths that circulate about our population and the way benefits are used.

Thank you for your continued hard work during these challenging times.

With much appreciation,

Julia E. Kehoe

Julia E. Kehoe
Commissioner

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. My SNAP client is self-employed. How do I verify his earnings?

A. Self-employment income is verified by business records, tax returns and other appropriate documents showing gross earned income as well as the total business expenses associated with this income. See 106 CMR 363.210(G) for more information.

Q. My SNAP client has recently become self-employed. How do I verify his earnings?

A. If a client has been self-employed for less than a year, the income is averaged over the period of time that the business has been in operation and the monthly projected amount for the coming year. If there is insufficient information to make this projection, then the household may be certified for less than one year, until the business has been in operation long enough to establish a longer projection of earnings. See 106 CMR 365.960(D) for more information.

Q. When verifying a client's self-employment earnings and associated business expenses, must I require that the client furnish the most recent available tax return as verification?

A. The appropriate document to verify self-employment earnings is dependent upon the circumstances. A client's annual or quarterly tax return is often an accurate means of verifying self-employment income information. However, if the self-employment income amount reported on the tax return does not reflect the household's current and actual circumstances because the household has recently experienced a substantial increase or decrease in business, then the self-employment income amount must be based on anticipated earnings. See 106 CMR 365.970(B) for more information.

Q. On my client's recent Universal Semiannual Report (USR), he indicated that he started his own business. Can this client continue on USR?

A. No. If your client is self-employed, then he is considered an exception to the USR requirement. Other USR exceptions include:

- households on TAFDC Monthly Reporting;
- households with a related TAFDC extension;
- households receiving TBA SNAP benefits;
- households containing a person who is SNAP work program required; or
- households in which all adult members are elderly or disabled and have no earnings.

See 106 CMR 366.110(C) for more information on SNAP USR exceptions.

Field Operations Memos

Fall 2010 SNAP Heat and Eat (H-EAT) Program Update

SNAP

Operations Memo 2010-48

DTA, in collaboration with the Department of Housing and Community Development (DHCD), provides H-EAT benefits to eligible SNAP households each year. Households newly eligible for H-EAT benefits will receive a significant increase in SNAP benefits based on receipt of the H-EAT Fuel Assistance Program.

This memo reviews H-EAT Fuel Assistance Program criteria, explains the responsibilities of DTA and DHCD, provides instructions for restoring lost SNAP benefits to H-EAT households and describes the DHCD client brochure. There is minimal case manager impact since the H-EAT Fuel Assistance Program enrollment and SNAP recalculation processes are fully automated.

Puerto Rico Birth Certificates

All

Field Operations Memo 2010-49

Effective October 31, 2010, a new law invalidates all birth certificates issued by the Puerto Rico Health Department prior to October 31, 2010 and requires Puerto Rico-born individuals to obtain new birth certificates.

This memo provides guidance to case managers on how to proceed as of October 31, 2010.

Beginning October 31, 2010, case managers must:

- continue honoring client birth certificates issued from Puerto Rico prior to October 31, 2010 that are already on file as they are considered to be permanent verifications and continue to satisfy program eligibility requirements;
- explain the new information about Puerto Rico birth certificates to affected applicants; and
- assist applicants in obtaining alternative verifications when a birth certificate from Puerto Rico issued before October 31, 2010 is furnished to document eligibility.

Field Operations Memos

Confidentiality of Case Record Information and the BEACON Heightened Level of Security Indicator

All
Operations Memo 2010-50

The Department of Transitional Assistance (DTA) is committed to keeping confidential all information about clients contained in both the physical case record and the Electronic Case Folder in BEACON 3.0. All DTA staff must ensure that information about the client is never disclosed without his or her written permission.

Case managers must discuss the availability of the Heightened Level of Security (HLS) indicator in BEACON when a client discloses concerns about confidentiality of information due to domestic violence or for any other reason. It is the responsibility of the case manager to accommodate a client's request to use the HLS indicator in BEACON immediately if that is the client's decision.

This Operations Memo:

- identifies a new process for assigning the HLS indicator to a case;
- introduces a new form, the Heightened Level of Security Confirmation/Declination (HLS-1) form;
- provides instructions for when and how to activate the HLS indicator;
- reminds all DTA staff to ensure client confidentiality; and emphasizes the impact of the HLS indicator to the client.

SNAP: Suspension of Interview Waiver for Certain Elderly/Disabled Households

SNAP
Operations Memo 2010-51

Effective immediately, case managers must no longer waive the interview requirements when recertifying SNAP eligibility for elderly/disabled households without earned income.

Case managers are now required to interview **all** elderly/disabled households at recertification and record interview information in BEACON accordingly. The Interview Method and Interview Date fields must be completed. The "Interview Waived" and "Interview Scheduled/Cancelled" selections have been removed from the Interview Method dropdown list.

Remember: All households must be interviewed at recertification. Unless a face-to-face interview is requested by the household specifically, interviews should be conducted over the telephone. Field Operations Memo 2009-64A, SNAP: *Waiver of Interview at Recertification for Certain Elderly/Disabled Households* is rescinded.

FYIs

Entering Medicare Part D Information in BEACON

When entering Medicare Part D information for elderly and/or disabled clients, case managers must be aware that there are two deductible expense amounts associated with the coverage. Any client who pays a Medicare Part D premium amount will also have a deductible amount associated with it. This deductible amount is an allowable medical expense for SNAP. The *premium* amount must be entered on the Health Insurance Page, and the *deductible* amount must be entered on the Medical Expense page.

To enter the *premium* amount, the case manager must first go to the Health Insurance page and, on the Policy tab, select Federal Government from the Insurer dropdown list. Next, enter the *premium* amount in the Premium Amount field and complete the remaining required information on the Policy tab. The case manager must next open the Benefits tab, select Medicare Part D from the Benefit Type dropdown list and complete the remaining fields of the Benefits tab.

To enter the *deductible* amount, the case manager must go to the Medical Expense Page and enter the deductible amount. The deductible amount can be $62.00 (subsidized) or $310.00 (non-subsidized) and should be indicated on the document the client provides for verification. If the case manager enters an amount other then the two amounts listed, an edit stating, "The only available Medicare Part D deductible amounts are $62.00 or $310.00" will appear.

Temporary MassHealth Cards

Field Operations Memo 2008-51 reminds TAO staff that cases must be in a pending status to issue temporary MassHealth cards. If MassHealth cards are issued without cases being established in a pending status, payment for services will be rejected by providers. To establish cases in a pending status, TAO staff must complete the following workflows on BEACON:

- Request for Assistance;
- Household Composition;
- AU Composition; and
- AU Composition Details.

NOTE: Before setting up a case with a temporary MassHealth card, check MMIS to determine if the client is already known to MMIS. If so, be sure to use the same:

- First Name
- Last Name
- Date of Birth
- Social Security Number
- Gender

to ensure the BEACON transaction links to the client's existing Medicaid ID number. If corrections to the client's demographic data are needed, once the eligibility has posted on MMIS under the existing Medicaid ID number, a second transaction must be sent to correct the information.

From the Forms File

New Form

02-550-1110-05
HLS-1 (11/2010)
Heightened Level of Security Confirmation/Declination

This *Heightened Level of Security Confirmation/Declination (HLS-1)* form must be completed when a client requests that the increased confidentiality safeguard indicator be placed on his or her case. Clients who request the HLS indicator must be informed that no information regarding the case will be given out over the telephone to the client or to anyone else. Refer to Operations Memo 2010-50 for more information.

Diversity Quote

"If we are to achieve a richer culture, rich in contrasting values, we must recognize the whole gamut of human potentialities, and so weave a less arbitrary social fabric, one in which each diverse human gift will find a fitting place."

Margaret Mead

TAO Meeting Notes