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## From the Commissioner

Dear Colleagues,

I am pleased to announce the Executive Office of Health and Human Services (EOHHS), together with the Department of Transitional Assistance, the Department of Mental Retardation, Massachusetts Commission for the Blind, and the Massachusetts Rehabilitation Commission released a Request for Responses (RFR) on Friday, February 27, 2009. The RFR solicits proposals from qualified bidders interested in providing Competitive Integrated Employment Services (CIES) to clients served by the participating Departments.

CIES is a Secretariat-wide master agreement which participating Departments will use to purchase an integrated, flexible array of services to support clients in obtaining competitive employment. In our case, the RFR will re-procure the programs currently purchased under the Employment Services Program (ESP). As a result, we will replace our previous program structure (Vocational Rehabilitation, Skills Training, Job Search/Job Readiness, and Supported Work) with new models that match clients' skills and interests with region-specific training and assistance.

This exciting initiative will prioritize funding to serve clients with the greatest barriers to employment and self-sufficiency, specifically those clients experiencing one or more of the following:

- Homelessness
- Disability
- Limited English proficiency
- Little or no work history
- Young parents (will also continue to be served under the Department's Young Parents Program).
- Multiple-agency involvement
- Long-term recipients of TAFDC

Providers who submit proposals will be asked to form or strengthen relationships with partner agencies to leverage community resources and to examine the labor and workforce data for their region. They will develop services that bridge the gap between our clients' skills and the needs of local

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## From the Commissioner (Continued from page 1)

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and regional employers. This is a new way of doing business which will offer more comprehensive services while focusing on measurable client outcomes and provider performance.

In the coming weeks, representatives from the Cash and Full Engagement Unit (CAFE) will visit each Transitional Assistance Office (TAO) to discuss how the new CIES/ESP contracts will affect your jobs and deliver better employment outcomes for clients. Details about the visit to your office will be forthcoming. In the meantime, many of you are likely to receive questions from potential bidders and other stakeholders. If you are contacted, please refer the interested party to [www.comm-pass.com](http://www.comm-pass.com). Once on the website:

- Click “Search for Solicitations”
- Enter “9CIEHSINTEGRATEDEMPLOYSRVCS” in the box labeled “Document Number”
- Click “Search.”

EOHHS will host two conferences to provide an opportunity to seek clarification regarding the RFR, the CIES model and the pricing and reimbursement structure for resulting service agreements. Bidders are not required to attend these conferences in order to submit a proposal, and may submit questions in writing. Directions to both sites are available on Comm-PASS:

*Eastern Massachusetts:*

1 Ashburton Place-Ashburton Café, Boston, MA  
 March 9, 2009, 10:00 am-12:30 pm

*Western Massachusetts:*

Daly Hall – DMR’s Monson/Palmer Facility, Palmer, MA  
 March 18, 2009, 1:00 pm-3:00 pm

Responses to the RFR are due by April 13, 2009, and completion of service agreements should take place by May 20, 2009. To ensure that proposals are evaluated in a timely fashion, representatives from each DTA unit are needed to join Procurement Management Teams (PMTs). This is an excellent opportunity to work with colleagues from across DTA to actively shape the future of our Department.

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## From the Commissioner (Continued from page 2)

Teams will be active between April 13<sup>th</sup> and June 30<sup>th</sup>. We anticipate you will need to dedicate approximately ten hours per week to the review process. In addition, all team members will need to be available on work days between 9:00 a.m. and 5:00 p.m.

Ten teams will each consist of five proposal reviewers and one minute-taker. In total, 72 representatives are needed:

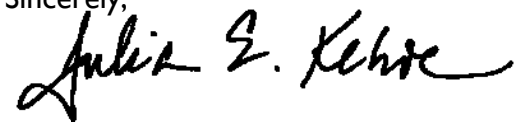
- Program and Policy Management– **15 representatives**
- Field Operations – **25 representatives**
- Strategic Development & Community Relations – **5 representatives**
- MIS – **5 representatives**
- Program Integrity – **5 representatives**
- A&F – **5 representatives**
- DTA Works Interns – **2 representatives** (Nonvoting Reviewers)
- Other EHS agencies – **8 representatives**
- Legal – **2 Legal advisors**

If you are interested in joining a PMT, please speak with your supervisor and contact Mary Otiato at [mary.otiato@state.ma.us](mailto:mary.otiato@state.ma.us). Team members will be confirmed by March 13th.

This RFR will help us in our mission to assist low-income individuals and families to meet their basic, needs, increase their incomes, and improve their quality of life. I look forward to the changes ahead which will prepare our clients for successful employment and brighter futures.

Thank you as always for everything you do.

Sincerely,



Julia E. Kehoe

## Quality Corner

This month we will discuss two errors which are both related to the shelter deduction. The first error was caused by shelter expenses that were incorrectly entered on BEACON while the second error was caused by the absence of the Disabled indicator on the case.

### Rental Deduction

At the time of application, the client provided a Landlord Verification form which indicated that she was responsible for rent in the amount of \$389 per month. However, the Landlord Verification form was signed by her spouse and QC determined that the house was owned by both of them. The BEACON record showed that in the past, both the husband and the wife had received benefits as a household of one each, even while they lived together.

The wife had most recently received EAEDC/ SNAP benefits for herself in 2008. The case manager apparently realized that she was married and living with her spouse because her EAEDC case was subsequently closed due to her husband's income and assets, while the SNAP portion of the case was closed due to lack of proof to determine if she or a household member was eligible.

Within 30 days of the closing, the SNAP case was reopened for a household of two. For shelter expenses, the case manager entered rent of \$389 based on the Landlord Verification form. The rent was added to a mortgage amount of \$397.84 that already existed on BEACON under the husband's name. The resulting sum gave the household a higher but incorrect shelter deduction, which caused an overpayment error.

### What's a Case Manager to Do?

Based on the closing reasons for the recent SNAP and EAEDC cases, and the fact that the husband was being included in the reopened SNAP case, the case manager should have asked detailed questions about the household circumstances. Since the husband was known to BEACON, it would have been useful to check if information such as income or shelter expenses existed on the windows or if there were BEACON matches for him.

As a rule, case managers must ensure that expenses are correctly entered on BEACON. This may be done by checking the calculation on the Results tab and reviewing the amounts that are being used in the SNAP benefit calculation. If the amount being used as a deduction seems inconsistent with the amount of the expense entered, the case manager should go to appropriate window and review the amount(s) that was entered. In the case of shelter expenses, it is also good practice to check to see if shelter expenses have been applied to other adults in the household; sometimes this causes the doubling of shelter expenses. For more information on entering shelter expenses, see *Attributing Shelter Expenses in BEACON*, an FYI in *Transitions* of December 2006.

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## Quality Corner (Continued from page 4)

### Shelter Deduction Capped and SSI

The case was recertified for a household of four which included the client, her spouse and two children. The household received TAFDC in the amount of \$531 for the client and the two children and SSI in the amount of \$571.39 for her spouse. The household paid rent of \$700 per month and was responsible for heat. Although the SSI amount was entered on the Other Income window of BEACON, the household's shelter deduction was capped at \$446. The case manager had failed to indicate that the client was disabled and to enter the source of the disability. The incorrect capped shelter deduction of \$446 resulted in an under issuance of \$97 for the review month.

### What's a Case Manager to Do?

Households with elderly (age 60 or more) and/or disabled members are allowed an uncapped shelter deduction in the SNAP benefit calculation. There is an automatic trigger in BEACON to allow this uncapped shelter deduction for households with at least one elderly member; however, in the case discussed above, the SSI recipient was **disabled but not elderly**.

Although the SSI amount was entered on BEACON, the case manager had to also indicate that the person was disabled by selecting the Yes radio button in the Disabled field of the Disability window and selecting the Determination Source of *SSI Dsbl'd Recipient/Certified*. BEACON would have determined that the shelter cap had to be lifted in the SNAP benefit calculation by looking at the Disabled indicator and the Determination Source. For more information on entering a disability in BEACON, see *A User's Guide: Transitional Assistance Programs and BEACON*, Chapter XIII-H.

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## From the Forms File

### Revised Brochure

*How to Apply for SNAP Benefits: Information for Seniors*

09-450-0209-05

09-451-0209-05(S)

SNAP-INFO - Seniors (Rev. 2/2009)

The *SNAP-INFO - Seniors* brochure has been revised to reflect the Food Stamp Program name change to Supplemental Nutrition Assistance Program (SNAP). Please discard old versions and use the revised version of this brochure.

### EA Online Form Availability

The *Notice to Emergency Assistance (EA) Families Placed in Hotels/Motels* (HM-NT Rev. 11/2008) form is now available online in English and Spanish. To access the form, go to *DTA Online*, *Policy Online*, *Online Forms*, and select EA. Refer to Field Operations Memo 2008-62 for more information.

## 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.** If verified, are legally obligated child support payments made by my client deducted as an expense from his gross income when determining the SNAP benefit amount?
- A.** Yes. Once verified, any legally obligated child support payments made by your client are deducted as an expense from his gross income as long as the payment is for a child living outside of your client's household. Legally obligated child support payments may include arrearages, health insurance, or third party obligations to landlords or utility companies.

Refer to 106 CMR 364.400(E) for more policy information on this topic. For procedural information on how to enter child support payment amounts in BEACON, refer to *A User's Guide: Transitional Assistance Programs and BEACON*, Chapter XIV-G.

- Q.** Do the regulations concerning legally obligated child support payment expenses also apply to legally obligated alimony payments?
- A.** No. Alimony payments are not an allowable expense deduction when determining a client's SNAP benefit amount.

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- Q.** Are the alimony payments received by a SNAP household considered countable income?

- A.** Yes. According to 106 CMR 363.220(B), alimony payments received by a SNAP household are considered countable unearned income.

- Q.** How does my client's child support payment information get verified?

- A.** Your client's legal obligation to pay child support, the amount of the obligation and the actual amount of his payments each must be verified for SNAP. Examples of acceptable verifications are as follows:

- Your client's current obligation to pay child support and the legally obligated amount of the payments can be verified by a court or administrative order, or other legally enforceable agreement.
- Your client's actual payment(s) can be verified through DOR, or by canceled checks, wage withholding statements, verification of withholding from unemployment compensation or statements from the custodial parent regarding direct payments or third party payments.

- Q.** I have a copy of my client's wage stub. My client's employer has told me that he will garnish employee wages only after receiving court documents or other legally enforceable agreements that verify the obligation. Why do I still need to verify my client's obligation with court documents when the employer has already checked into this?

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## From the Hotline

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- A.** Your client's pay statement may not provide you with all of the required information. In addition to any child support obligation, the amount withheld on a client's wage statement may also include alimony. In other words, the withheld amount may be a combination of these two legal obligations. While the client's wage stub may not differentiate between these two obligations, up-to-date court documents will distinguish between your client's child support and alimony requirements.
- Q.** Can court documents verifying my client's legal obligation also be used as proof of my client's actual monthly child support payments?
- A.** No. Court documents verifying your client's legal obligation cannot be used as proof of your client's actual monthly child support payments because while they demonstrate your client's legal requirement to pay, they do not indicate whether your client is actually fulfilling his legal requirement. Refer to 106 CMR 361.610(J) for more details.
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## Field Operations Memos

### Department Obligations under the Americans with Disabilities Act (ADA)

All

Field Operations Memo 2009-7

The Department has certain obligations towards applicants and clients under the Americans with Disabilities Act (ADA) and Section 504 of the Rehabilitation Act of 1973. Section 504 makes it illegal for public agencies receiving federal funds to discriminate against individuals with disabilities. Title II of the ADA prohibits discrimination on the basis of disability by state and government entities. The purpose of this memo reminds TAO staff about:

- current ADA policies;
- timelines for processing ADA accommodation requests; and
- TAO Accommodation Teams used for handling and reviewing ADA-related issues, including requests for ADA accommodations.

## Field Operations Memos

### Vocational Specialists and Job Search/Job Readiness Workshops

TAFDC

Field Operations Memo 2009-8

Vocational specialists in certain TAOs will be offering Job Search/Job Readiness workshops to our TAFDC clients. These Job Search/Job Readiness workshops will address all aspects of obtaining and maintaining a job.

These workshops are available to clients only in TAOs where vocational specialists are assigned: Brockton, Dudley Square, Fall River, Holyoke, New Bedford, Newmarket Square, Revere, Springfield Liberty, Springfield State and Worcester. Clients will be able to participate in workshops through the vocational specialist's recommendation. These workshops began in February. This memo informs TAO staff:

- about the workshops;
- the benefits of the workshops; and
- how clients are enrolled in the workshops.

### Holyoke Regional Homeless Unit

EA

Field Operations Memo 2009-9

The Holyoke Regional Homeless Unit has been formed to accommodate and better manage the homeless population from the Springfield and Holyoke offices. Effective December 29, 2008, all EA cases and corresponding cash and/or SNAP cases in the Springfield State and Springfield Liberty offices were transferred to the Holyoke TAO. EA applications taken after December 20, 2008 were processed and transferred to the Holyoke Regional Homeless Unit.

Prior to December 29, 2008, a letter was mailed to all clients affected by this change, informing them of the transfer.

This memo tells case managers the reason for the change, that clients have been notified of the change, and specifies case manager/Homeless Coordinator responsibilities for Springfield State and Springfield Liberty TAOs, as well as for all other TAOs with EA families whose placement is in an area served by the Holyoke or Springfield TAOs.



## Field Operations Memo

### DTA/DMH SNAP Refresher Trainings – Questions and Answers

SNAP

Field Operations Memo 2009-10

The Department has provided a series of SNAP Refresher trainings to DMH case managers and provider staff in recent months. A number of questions were raised during the course of these regional trainings. Some of the questions required consultation with USDA and others needed DTA/DMH input. This memo transmits the questions along with answers so that DTA and DMH staff have accurate information. These questions and answers relate to the streamlined SNAP processing developed for DMH clients living in group homes or residing independently. See Field Operations Memo 2005-13 and Field Operations Memo 2004-41 for more information.

### Centralized Data Entry for Boston Family Housing EA Shelter Exits

EA

Field Operations Memo 2009-11

As of February 24, 2009, the Centralized Eligibility and Processing unit in Central Office assumed responsibility for data entry on BEACON of all shelter exits of EA families from the Boston Family Housing office.

### ESP Providers Offering LD Screenings

TAFDC

Field Operations Memo 2009-12

To increase the number of applicants and clients who are assessed for a learning disability (LD), DTA has developed a process for ESP providers to offer LD screenings to clients who appear to have a learning disability. For clients who have not had an LD assessment, this new initiative will give them another opportunity to be screened, increasing the chance that a learning disability will be identified and accommodated. As a result, these clients are more likely to meet the participation requirements of the activity they are enrolled in and once the activity is successfully completed, become employed. Effective March 1, 2009 this service is offered in the Newmarket Square and Dudley Square TAOs. This memo informs:

- TAO Staff about this revised procedure; and
- case managers about their responsibilities.

## Field Operations Memos

### SNAP Application Process for Veterans Receiving State Veterans' Benefits

#### SNAP

#### Field Operations Memo 2009-13

Massachusetts Veterans' Benefits are administered by local Veterans' Service Officers (VSOs) in cities and towns. In some instances, the VSO makes vendor payments directly to the veteran's landlord and/or utility company for the veteran's housing or heating/cooling costs. These vendor payments should be excluded from countable income for SNAP eligibility purposes.

This memo:

- clarifies procedures for processing SNAP applications received from veterans whose VSO makes a vendor payment for shelter or utilities; and
- introduces the Veterans' SNAP Benefit Job Aid.

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## FYIs

### Changes to DTA Online

This month, the following changes have been made to **DTA Online**:

- A new issue of the *Perspectives* newsletter has been added and is accessible through the **Diversity** side-bar option;
- National Women's History Month has been added as a new Event and is accessible through the **Diversity** side-bar option; and
- A Job Aid concerning Outlook Passwords has been revised and is accessible through the **Training** side-bar option.

#### 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**

## FYIs

### Changes to the EOHHS mass.gov DTA Homepage

Changes to the EOHHS mass.gov DTA Homepage include:

- SNAP outreach activities and training sessions have been added to “DTA Upcoming Activities,” which is accessible through the **News and Updates** side-bar option;
- the “Emergency Assistance RFR Summary of Awards” link, has been added and is accessible through the **News and Updates** side-bar option;
- updates have been made to the “Food Assistance” page, which is accessible through the **What We Do** side-bar option;
- an updated TANF State Plan has been included in the “Cash Assistance” listing, which is accessible through the **What We Do** side-bar option; and
- updates have been made to our caseload information, which can be accessed by selecting the appropriate Department program (EAEDC, FS, Homeless, SSI, TAFDC) beneath the **Research & Statistics** side-bar option.

### Decrease in Federal Mileage Rate

Effective immediately, TAO staff must use the federal mileage rate of 55 cents per mile when calculating allowable transportation costs to be used as a medical or a dependent care deduction. The new federal mileage rate represents a decrease from the rate issued in an *FYI* in *Transitions* of August 2008.

### EA Six-Month Cases

Field Operations Memo 2009-5 (*TAFDC, EA and SNAP - 2009 HHS Poverty Guidelines*) informed staff that MIS would run a query to identify EA families who were determined eligible as an EA Six-Months case between January 23, 2009 and February 1, 2009 and whose income is less than the increased EA Eligibility Standard. The query has been run, and no EA cases were identified who meet these criteria; therefore, no staff actions are needed.

## FYIs

### Receipt of Retirement, Survivors, Disability Insurance (RSDI) Income

A recent Quality Control review determined that a case was in error because of RSDI income that had not been counted in the SNAP benefit calculation. The client had failed to report this income to the case manager. At initial certification, the elderly client had reported a private pension as the only source of income.

Case managers are reminded to perform an SVES inquiry on elderly and/or disabled clients to see if there is income from Social Security, i.e. SSI or RSDI.

**Remember:** Receipt of a private pension is often an indicator that a client is receiving income from Social Security.

### Social Security Number Verification Match Reminder

To prevent errors (for example, duplicate household members, or “998” SSNs), it is important to ensure that Social Security Number (SSN) Verification Matches are processed correctly. These matches are identified on the case manager’s SSN Verification Match view and are updated daily. The matches found on BEACON in the TAO Office Explorer views are: DOB (Date of Birth) Is Different, Does Not Match With SSA, Listed Under Another Name and Unknown to SSA.

To reduce the chance of an SSN Verification Match error, case managers must:

- ensure that the correct SSN is verified. Always double-check the digits for accuracy;
- process SSN Verification Matches following instructions in *A User’s Guide: Transitional Assistance Programs and BEACON*, Chapter II.

To maintain data integrity, supervisors should access their staff’s SSN Verification Match views and ensure that the case manager has taken the appropriate action on these views in a timely manner.

Pay special attention to the instructions on pages 29-31 of the *User’s Guide* chapter referenced above to ensure that noncitizens who are not applying for benefits but who appear on an SSN Match are dispositioned using correct procedures.

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## Dates to Remember

**March 15, 2009**

**EOHHS Health Care Spending Account “Grace Period” deadline**

After speaking with your manager about the details of this deadline, additional questions may be sent to: [AskHR@ehs.state.ma.us](mailto:AskHR@ehs.state.ma.us).

**March 17, 2009**

**Evacuation Day** (Suffolk County)

**April 13, 2009**

**GIC Annual Enrollment for FY 2010 begins**  
This enrollment will run through May 15, 2009.

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## TAO Meeting Notes