



INSIDE THIS ISSUE:

Quality Corner	3
From the Forms File	4
From the Hotline	5
Bay State CAP Outreach Plan Phase 3 Fix: Opening Eligible Cases	6
Competitive Integrated Employment Services (CIES) Procurement: Vendors Update for Milford and Plymouth	6
Tracking Slot Usage in BEACON	6
Diversity Quote	6
Transitioning Certain Clients to Non-CIES Funded Activities	7
EAEDC and TAFDC - SSI Extension of Benefits	7
Fall 2009 SNAP Heat and Eat (H-EAT) Program Update	7
Cultural Communication	7
Modifications to the Waiver of the Face-to-Face Interview	8
Waiver of Interview at Recertification for Certain Elderly/Disabled Households	8

From the Commissioner

Governor Patrick has announced \$352 million in budget cuts in order to close a \$600 million budget gap. The Governor made tough decisions in order to maintain our commitment to preserve safety net programs for low-income individuals and families. As part of this effort, DTA's budget will be reduced by \$22.4 million. Although these cuts will have a significant impact on our agency and operations, we are relieved that none of our programs and services have been eliminated. DTA's cuts will come from our Administrative account, CAFE/ESP, and surplus savings.

Administration

As you know, the Governor has already announced mandatory furloughs for managers of up to nine days, based on annual salary. At DTA, these furloughs will save approximately \$200,000.

I have been hearing from many bargaining unit staff members who are interested in participating in the furlough program, and I thank you for your thoughtfulness and generosity. The Patrick Administration is working with the unions to address these issues.

In addition to the management furloughs, I regret to announce that we will be required to lay-off an estimated five to fifteen DTA employees. We do not yet know who will be affected by this, or when, but we will prioritize the elimination of management positions that are not critical to the operation of our core programs. Once identified, I hope to be able to give these colleagues as much notification as possible. At this time, we do not anticipate any layoffs for bargaining unit employees. The Administration continues to negotiate with the unions to identify ways bargaining unit employees can help to mitigate layoffs. The Governor has indicated that if the parties are unable to reach an agreement, he may need to revisit the issue of layoffs.

CAFE

One of our reductions is to start counting the income of individuals receiving SSI benefits toward determining eligibility for TAFDC. The income of individuals receiving SSI will now be counted, after disregarding \$100 per month. Currently, we do not count the income of any members of a TAFDC family receiving SSI, including the SSI income or any RSDI amount, when

(Continued on page 2)

(Continued on page 2)

From the Commissioner (Continued from page 1)

(Continued from page 1)

Assignment of Child Support Arrears	8
FYI - Getting Ready for BEACON 3	9
Checking External Agency Matches in BEACON	10

determining eligibility and grant levels. This was a federal requirement prior to 1996, but is now optional. We chose not to change the rule until now in order to maximize benefits for people with disabilities; however, this is inconsistent with the treatment of other income, like earned income and child support. Although this change will equalize benefit calculations for all families, it will nevertheless reduce benefits for families in need. As a result of this change, we anticipate approximately 8,400 cases will close, and 700 families' grants will be reduced. We will work with our stakeholders to communicate these changes and to inform affected clients that, as a result, their SNAP benefits will likely increase and their rent share (if they are in public or subsidized housing) will likely decrease.

TAFDC clients will be further affected by an increase in the work participation requirement from 24 to 30 hours per week for non-exempt households where the youngest child is six to eight years old. This change will align our state requirements with the federal government and will be less confusing for clients.

ESP

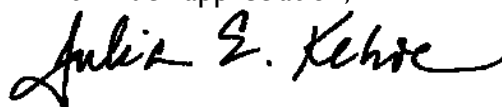
We were recently awarded \$1.5 million in bonus funding from USDA for the timely processing of our SNAP cases. The legislature requires DTA to use these funds for employment and training programs. This funding has been eliminated. In addition, we will need to reduce our Employment Services by \$2 million. We will share more information about these reductions as it becomes available and will communicate with our providers and stakeholders regarding these changes.

Surplus Savings

DTA currently has a projected surplus in our EAEDC, State Supplement to SSI, and Supplemental Nutrition Assistance (SNA) accounts because spending in these programs is expected to be lower than the amount appropriated by the Legislature. These surpluses will be taken away, resulting in a reduction of \$2.3 million.

I thank you for your patience during this difficult time. We will follow up with memos, conference calls, or office visits as additional information becomes available. It is important for us to hear your feedback and suggestions for addressing these financial difficulties. Thank you as always for your tireless efforts to assist the low-income individuals and families of Massachusetts.

With much appreciation,



Quality Corner

This month we will discuss two errors. The first error was caused by unreported earnings while the second error was caused by an incorrect certification type that was assigned to the case.

Earnings and BEACON Matches

This PA SNAP case included one adult and two children. At initial certification, the family's only income was \$633 in TAFDC benefits per month. As of the review month, May 2009, the household's SNAP certification period expired, but the family continued to receive SNAP benefits. Unlike NPA SNAP cases, this is standard for PA SNAP cases.

On August 19, 2008, the client reported that she had started working. The case manager issued a verification checklist to the client, requesting proof of wages. The wage information was not provided by the client, but the case manager did not close the case. An earned income match later appeared in the Match History tab. By the time of the QC review, two earned income matches for the same employer had appeared on the Match History tab. QC determined that the case was ineligible for SNAP benefits based on the earned income amount. This caused a large overpayment error for the review month.

What's a Case Manager to Do?

The case manager should have followed through and entered a closing when the client failed to provide verification of income. Although this was not done, the case manager had another opportunity to correct the case by exploring the earned income matches that appeared on BEACON for this case. Failure to follow up on the verifications requested and failure to act on the earned income matches caused this case to be in error. Case managers must check the Verifications Due view to track outstanding verifications and close cases if appropriate. Case managers must also check the Match History tab each month, and check for matches at application, recertification and as a part of any case maintenance activity.

Incorrect SNAP Recertification Type

The second case was an NPA SNAP case that included two adults and five children. The household received a full SNAP allotment of \$1052 for a household of seven with no income. A Universal Semiannual Report was received by the case manager on March 31, 2009, and a verification checklist requesting outstanding verifications was sent to the client. After the verifications were received, the case was put on Recertification (i.e. certified as a change reporter) with a 12-month certification period, spanning April 2009 through April 2010.

Shortly after completing the recertification, the client started working two jobs, earning \$1885 per month. The earnings were not reported by client. Because the case was now certified as Recertification, and not USR, the client was obligated to report the earnings within ten days. This unreported income subsequently caused an overissuance of \$260 for the review month.

(Continued on page 4)

Quality Corner (Continued from page 3)

What's a Case Manager to Do?

When the client recertified, she had no earnings. However, the case should have remained on USR because the client and/or her spouse had a history of earnings, which is the reason the client was certified as USR even when the case had no income.

Being on USR protects a case from error if the client or other household member starts a job or receives new income during the certification period, provided the income is below the maximum allowable gross income for the household size.

In this case, the family started to receive income that was less than the gross income limit for their household size. Therefore, if the case had been certified as USR, the error would have been avoided. The new income would have been counted at the next recertification. For more information on Universal Semiannual Reporting see *Transitional Assistance Programs and BEACON: A User's Guide: Chapter IV-C*.

From the Forms File

New Brochure

The *How to Get Supplemental Nutrition Assistance Program "SNAP" Benefits* and the *How to Apply for SNAP Benefits: Information for Seniors* brochures have been obsoleted. A new brochure, *How to Get SNAP Benefits*, replaces both brochures. The *How to Get SNAP Benefits* brochure includes an insert with information for elderly applicants. An initial supply of the brochure and inserts will be shipped to TAOs.

How to Get SNAP Benefits Brochure

09-075-1009-05

09-076-1009-05(S)

SNAP-BB (10/2009)

The following brochures are now obsolete and have been replaced with a new *How to Get SNAP Benefits* brochure. Please discard the old brochures and use the new brochure.

How to Get Supplemental Nutrition Assistance Program "SNAP" Benefits

09-070-0209-05

09-079-0209-05 (S)

SNAP INFO (Rev. 2/2009)

How to Apply for SNAP Benefits: Information for Seniors

09-450-0209-05

09-451-0209-05 (S)

09-452-0309-05 (Russian)

09-453-0309-05 (Vietnamese)

SNAP INFO - Seniors (Rev. 2/2009)

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 TAFDC applicant reported that he recently lost his job. During the application interview, he also said that he still holds the lease on a 2007 truck that he had been using to get to and from his job. Since this applicant does not currently own his vehicle, is it considered a noncountable asset?
- A.** Yes. As long as your client does not own the vehicle, then the asset is not counted. For more information on vehicles and countable assets in the TAFDC Program, refer to 106 CMR 204.120. In SNAP, TAFDC families are considered categorically eligible households, and therefore their assets are not taken into consideration when determining eligibility, according to 106 CMR 365.180. (For households that are not categorically eligible, vehicles are noncountable assets, according to 106 CMR 363.140.)
- Q.** My TAFDC applicant has explained that she was recently the victim of domestic violence and has moved out of her abuser's home. When she came in to apply, she also reported that she and her abuser co-own a car and a savings account. Her combined assets exceed the \$2,500 asset limit. Are these assets countable?
- A.** It depends. Assets are not counted in the TAFDC Program if they are considered inaccessible, according to 106 CMR 204.125. For a victim of domestic violence, assets are considered inaccessible if it is documented that attempting to access the assets puts the client at risk of further domestic violence. This determination is made only after the case manager has conferred with the client as well as his or her domestic violence specialist.
- Q.** When the case manager is determining whether or not the assets of a domestic violence victim are inaccessible, must the client also request a good cause waiver of a TAFDC Program requirement due to domestic violence, as described in 106 CMR 203.110?
- A.** No. Although case managers must explain the good cause waiver process to TAFDC clients who are victims of domestic violence, requesting such a waiver is not a requirement for the client when the case manager is determining whether or not a domestic violence victim's assets are accessible.
- Q.** What is considered acceptable documentation when determining whether or not a TAFDC client's assets are inaccessible due to domestic violence concerns?
- A.** In consultation with the domestic violence specialist, the case manager must provide examples of the types of documentation that will verify the previous domestic violence as well as the risk of future domestic violence. These include records from: domestic violence programs, the courts, law enforcement and/or the medical community. However, if these records are unavailable, a signed statement from the individual is acceptable. Refer to 106 CMR 203.110(D) for more information on acceptable forms of documentation.

Field Operations Memos

Bay State CAP Outreach Plan Phase 3 Fix: Opening Eligible Cases

SNAP

Field Operations Memo 2009-28B

In May 2009, the Department sent outreach notices to 13,000 SSI clients who appeared eligible for Bay State CAP food assistance benefits. It was later determined that approximately 1,400 of these clients, who were otherwise eligible, did not open for Bay State CAP food assistance benefits in July as indicated in the outreach notice.

This Field Operations Memo informs TAO staff that these cases that did not open in July for Bay State Cap food assistance benefits have been opened for October. In addition, these clients have been issued retroactive benefits for July, August, and September.

Competitive Integrated Employment Services (CIES) Procurement: Vendors Update for Milford and Plymouth

TAFDC

Field Operations Memo 2009-51A

Field Operations Memo 2009-51 informed TAO staff about the vendors who were awarded contracts through the CIES procurement process and the number of available slots for each vendor in the specific component/activity. Field Operations Memo 2009-51A informs TAO staff about new vendors in the Milford and Plymouth TAOs and the number of available slots for each vendor in the specific component/activity.

Tracking Slot Usage in BEACON

TAFDC

Field Operations Memo 2009-57

Field Operations Memo 2009-51 stated that, while slots may be limited for some CIES components/activities, case managers are strongly encouraged to make referrals immediately to the appropriate CIES component/activity for their clients until the slots are no longer available. Field Operations Memo 2009-57 gives TAO staff procedures to determine if slots are available for a particular component/activity. Due to the limited number of slots, it is important that TAO staff familiarize themselves with this memo and the functionality of the window.

Diversity Quote

“Human diversity makes tolerance more than a virtue; it makes it a requirement for survival.”

René Dubos

Field Operations Memos

Transitioning Certain Clients to Non-CIES Funded Activities

TAFDC

Field Operations Memo 2009-58

This memo informs TAO staff:

- about TAFDC clients who were in Supported Work or Skills Training activities at the time of the CIES procurement, and were allowed to complete the activity; and
- how to make referrals to a One-Stop Career Center.

EAEDC and TAFDC – SSI Extension of Benefits

EAEDC and TAFDC

Field Operations Memo 2009-59

A new law, “The SSI Extension for Elderly and Disabled Refugees Act,” has temporarily extended SSI eligibility for certain refugees and immigrants for an additional two years. In June, SSA sent a letter to clients who could potentially benefit from this extension of SSI benefits. This memo informs TAO staff how to process clients who received this mailing.

Fall 2009 SNAP Heat and Eat (H-EAT) Program Update

SNAP

Field Operations Memo 2009-60

DTA in collaboration with the Department of Housing and Community Development provides H-EAT benefits to eligible SNAP households each year. Most households 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.

Cultural Communication

Each month, the Diversity Council will offer tips about communicating with people of different cultures.

Your Somali client may practice Islam and their religion is very important to them. Shaking hands with a person of the opposite sex is considered rude in Islamic culture.

Field Operations Memos

Modifications to the Waiver of the Face-to-Face Interview

SNAP

Field Operations Memo 2009-63

To improve customer service, increase efficiency and reduce the case processing burden for case managers, the Department recently requested and received approval from USDA to modify the current waiver of the face-to-face interview to allow telephone interviews at *both* application and recertification without the need to document hardship.

This memo:

- describes the terms of the modified waiver;
- outlines case manager responsibilities for conducting telephone interviews; and
- discusses BEACON changes to track interview type.

Waiver of Interview at Recertification for Certain Elderly/Disabled Households

SNAP

Field Operations Memo 2009-64

The Department has requested and received a waiver from USDA that allows case managers to waive the interview requirement at recertification for SNAP benefits for certain elderly or disabled households without earned income.

This memo discusses:

- the terms of the waiver;
- which households can have the interview waived and which households cannot have the interview waived;
- case manager responsibilities for applying the waiver, and
- BEACON changes to track the waiver.

State Letter

Assignment of Child Support Arrears

TAFDC

State Letter 1355

This State Letter transmits a change in the TAFDC nonfinancial eligibility regulations.

Due to a change in federal law, TAFDC applicants or recipients are no longer required to assign to the Commonwealth child support arrears that accrue prior to their application for TAFDC.

This material is effective October 1, 2009.

FYIs

Getting Ready for BEACON 3

Development of BEACON 3 is ongoing and is currently in the final stages of Systems testing. While the implementation date is being finalized, we can begin preparing for the upcoming change. This column, “Getting Ready for BEACON 3,” will appear periodically in future *Transitions* so that you will be up-to-date on significant project milestones. This month’s column addresses some of the tools to be used before, during and after BEACON 3 implementation.

BEACON 3 Flashes

The BEACON 3 Flashes are a good introduction to the new system. To access these Power Point presentations, log into [PACE](#) from our Training Unit’s Web page, select “Conference and Media Center,” and then choose “Audio & Video Presentations.” These Flashes allow users to see actual BEACON 3 pages and gain an understanding of how to navigate through the new system.

Until future classroom training begins, the Flashes play an important role in familiarizing users with BEACON 3.

BEACON 3 Updates

Look for BEACON 3 Updates to be issued soon. Just as “BEACON Bulletins” and “BEACON Today’s” helped staff implement previous BEACON increments, BEACON 3 Updates will:

- highlight any significant issues resulting from the BEACON 2 to BEACON 3 change;
- review key BEACON 3 user procedures that require additional attention or modification; and
- detail ongoing enhancements to BEACON 3.

BEACON 3 Online Guide and BEACON 3 HELP

The BEACON 3 Online Guide and BEACON 3 HELP are currently under development and will be accessible through BEACON 3. Both products will contain the instructions you need to know to do your job on the new system.

BEACON 3 User Acceptance Testing (UAT)

While the Systems testing of BEACON 3 is ongoing at Central Office, a User Acceptance Test (UAT) period is being scheduled for selected TAO and Central Office staff. Sample case activities to test have been formulated. Also, UAT teams from local TAOs have been identified and will be trained prior to the start of testing. More information regarding how test results will be obtained and communicated will be made available to staff once finalized.

FYIs

Checking External Agency Matches in BEACON

The importance of checking external agency matches in BEACON has been heightened recently by an increasing number of Quality Control errors occurring related to unreported income. BEACON regularly performs client matches with external agencies as follows:

- DSS (DCF) Placement (monthly),
- Earned Income (semimonthly),
- SSN Verification (daily), and
- Unearned Income (monthly).

These matches are generated automatically with the frequency listed above. **Each month and at all case maintenance activity**, the case manager must check for any matches the client may have on BEACON and follow up on matches as appropriate. When new information is received from an external agency on a client in BEACON, that information will appear in the client's case in the *External Agency Matches* view. Supervisors must also make sure all current matches have been reviewed and followed up on before authorizing a case.

TAO Meeting Notes