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Field Operations Memo 2005-18
April 5, 2005

To: Transitional Assistance Office Staff
From:  Cescia Derderian, Assistant Commissioner for Field Operations
Re: Bay State CAP Questions and Answers

Background

The Commonwealth of Massachusetts Combined Application Project (Bay State CAP) was implemented on February 1, 2005. Field Operations Memo 2005-4 provided detailed information about the Bay State CAP project, including the responsibilities of Social Security Administration (SSA) and Department of Transitional Assistance (DTA) staff. The memo also described the conversion process, in which BEACON converted eligible food stamp Assistance Units (AUs) in receipt of Supplemental Security Income (SSI) to Bay State CAP. This memo transmits information regarding issues/concerns that have been raised in connection with the implementation of Bay State CAP. The format is a series of questions and answers and is divided into two sections: conversion issues and process issues.

CONVERSION ISSUES

**Bay State CAP
 Approval
 Notices Issued
 During
 Conversion**

Q 1: One of my recipients was converted from regular food stamp benefits to Bay State CAP. Why can't I locate the Bay State CAP approval letter in Document History in BEACON?

A: When the Department makes a mass change that affects a large number of AUs, BEACON sends out a special notice that does not appear in Document History.

Note: Copies of these notices were provided at the Bay State CAP training.

CONVERSION ISSUES – *Continued*

**Determining the
Bay State CAP
Denial Reason**

Q 2: How do I find out why an SSI recipient who receives regular FS benefits was denied Bay State CAP during conversion?

A: To determine why BEACON denied an AU for Bay State CAP during conversion:

- Open the AU in BEACON;
- Click on the Results tab;
- Select the conversion transaction;
- Click on the Financial tab;
- Click the caret to open the Benefit Change Reason section; and
- View the denial reason that appears there.

**No Denial
Letters Issued
During
Conversion**

Q 3: Were denial notices issued during Bay State CAP conversion?

A: No. The Department decided not to issue denial notices because of the confusion such a notice could cause for many recipients.

**Bay State CAP
Data
Discrepancy
Conversion**

Q 4: A recipient who appears to meet the eligibility criteria for Bay State CAP was denied Bay State CAP benefits. Can she be converted to Bay State CAP and is she entitled to retroactive benefits?

A: Central Office has identified about 850 AUs that potentially should have been converted to Bay State CAP but were not, because BEACON information did not match State Data Exchange (SDX) system information.

- Marital status was the most common discrepancy causing a denial of Bay State CAP benefits.
- The Department updated the BEACON data on these AUs and ran another conversion on the evening of March 29, 2005. 375 AUs were converted to Bay State CAP for April benefits.
- Retroactive benefits owed, if any, will be automatically issued. AUs will receive a separate notice regarding retroactive benefits.

**Bay State CAP
COLA
Conversion
Catch-up**

Q 5: I noticed that BEACON converted some AUs in my caseload to Bay State CAP a couple of weeks after the initial conversion. Should that have happened?

A: Yes. MIS ran a catch-up conversion batch job on 2/15/05 for AUs that did not have BENDEX/SDX amounts on the original RSDI/SSI COLA file.

CONVERSION ISSUES – Continued

Eligibility for Bay State CAP Addressed at Next SSI Redetermination for Recipient Receiving Regular FS Benefits

Q 6: An SSI recipient who applied and was approved for regular FS benefits after the Bay State CAP conversion wants to apply for Bay State CAP benefits. What should I tell him?

A: Tell the recipient that Bay State CAP will be addressed at the next redetermination of SSI eligibility. **Do not send the recipient to the SSA field office to apply for Bay State CAP benefits.** If the recipient wants to find out when the next redetermination will take place, refer him to SSA. The SSA phone number is 1-800-772-1213.

Note: The Department is considering converting SSI recipients who began receiving regular FS benefits after conversion and are eligible for Bay State CAP during future outreach efforts. More information will be provided to TAO staff when the outreach plan is finalized.

Some DMR/DMH Group Home Recipients Converted to Bay State CAP

Q 7: A recipient who lives in a DMR group home was converted to Bay State CAP and transferred to the Regional SSI office. Should this have happened?

A: Yes. The Department anticipated that some DMR/DMH group home recipients would be converted to Bay State CAP. This will occur when the DMR/DMH AU would receive a higher benefit under Bay State CAP.

Pending Bay State CAP AUs

Q 8: When I attempted to initiate an application for regular FS benefits using the FSP/SSA-1 faxed by the SSA field office, I found that there was already a pending Bay State CAP AU on BEACON. What should I do?

A: During the initial weeks of Bay State CAP, a programming problem caused some Bay State CAP AUs to be put into a pending status prematurely. This prevented the processing of a regular FS AU on BEACON. MIS is reviewing these AUs. Once MIS has identified a resolution, a report of impacted AUs will be generated and instructions will be issued to TAO staff.

PROCESS ISSUES

Eligibility for Bay State CAP Addressed at Application for SSI for a Recipient of Regular FS

Q 9: A regular FS recipient who has a pending initial application for SSI wants to apply for Bay State CAP. What should I tell her?

A: Tell the recipient that Bay State CAP will be addressed as part of the SSI application process.

- If SSA determines that the SSI approval will take less than 30 days, SSA staff will address Bay State CAP at the initial application interview. When SSA transmits the SSI approval to DTA, BEACON will switch the recipient to Bay State CAP if the benefit is higher.
- If SSA determines that the SSI approval will take more than 30 days, SSA staff will address Bay State CAP during a follow-up application interview once the client is found disabled. When SSA transmits the SSI approval to DTA, BEACON will switch the recipient to Bay State CAP if the benefit is higher.

SSA Faxes Front of FSP/SSA-1 When Applicant Answers “No” to Expedited Service Questions

Q 10: The new one-page application for regular food stamp benefits (FSP/SSA-1) is a two-sided form. Why did SSA fax only the front side?

A: SSA staff have been instructed to fax only the front side of the FSP/SSA-1 when an SSI applicant/recipient does not respond with a “Yes” to any of the expedited service questions on the reverse side of the form. In such cases, the “Qualified for Expedited” box at the top of the front page will not be checked.

If an applicant responds with a “Yes” to one of the expedited service questions, SSA staff will check the appropriate box on the reverse of the FSP/SSA-1 and check the “Qualified for Expedited” box on the front of the form. In these instances, SSA staff will fax both the front and back of the FSP/SSA-1 to the appropriate DTA office.

The application start date is the day DTA receives the faxed FSP/SSA-1.

Reminder: DTA has an obligation to screen all FS applications for expedited service.

PROCESS ISSUES - Continued

**Verifying
Identity for
Applicant Who
Applied at SSA
and
Is Eligible for
Expedited
Benefits**

Q 11: Do I need to verify the identity of an applicant who completed the FSP/SSA-1 at an SSA field office and who, following the telephone interview, appears eligible for expedited benefits?

A: No. SSA has verified the identity of such an individual. The AU manager must:

- Go to the Verification tab;
- Select the item (Identity) to be verified;
- Select Collateral Contact in the Verified With field; and
- Click Fast Path to save the verification.

**Applicant Mails
FSP/SSA-1 to
DTA Office**

Q 12: SSA usually faxes the FSP/SSA-1, but sometimes an SSI applicant/recipient mails it directly to the TAO. Is either method acceptable?

A: Yes. SSA procedures regarding the transmission of the FSP/SSA-1 to the appropriate TAO are as follows:

- When SSA conducts an interview in the office, SSA staff will fax the FSP/SSA-1, along with any verification(s) the SSI applicant/recipient brought, directly to the appropriate TAO.
- When SSA conducts an interview over the telephone, SSA staff will mail the FSP/SSA-1 to the SSI applicant/recipient for signature.
 - ✓ If SSA is requesting verifications, SSA staff will ask the individual to mail the signed FSP/SSA-1 and verifications to the SSA office. Once received, SSA staff will fax the FSP/SSA-1 and verifications to the appropriate DTA office.
 - ✓ If SSA is not requesting verifications, SSA staff will tell the individual to mail the FSP/SSA-1 directly to the appropriate DTA office.

**Eligibility for
Bay State CAP
Addressed at
Next SSI
Redetermination**

Q 13: An SSI recipient who does not receive FS benefits wants to apply for Bay State CAP. What should I tell her?

A: Tell the recipient that Bay State CAP will be addressed at the next redetermination of SSI eligibility. **Do not send the recipient to the SSA field office to apply for Bay State CAP benefits.** If the recipient wants to find out when the next redetermination will take place, refer her to SSA. The SSA phone number is 1-800-772-1213.

PROCESS ISSUES – Continued

Note: Encourage the individual to apply for regular FS benefits. The Department is considering converting SSI recipients who began receiving regular FS benefits after conversion and are eligible for Bay State CAP during future outreach efforts. More information will be provided to TAO staff when the outreach plan is finalized.

**Reported
Change of
Address**

Q 14: A Bay State CAP recipient informed me that she has moved. What should I do?

A: Tell the recipient that she must report the change of address to SSA if she has not already done so.

- If the new address is in Massachusetts, take no further action.
- If the new address is not in Massachusetts, check SDX to determine if SSA is aware of the address change.
 - ✓ If the new address appears on SDX, tell the recipient that her case will be closed (BEACON will automatically close the AU once the SDX address information is received).
 - ✓ If the new address does not appear on SDX, have your office designee call the Policy Hotline to report the change. Central Office will contact SSA and appropriate action will be taken.

**Bay State
CAP Denial
Notices for
Ongoing AUs**

Q 15: The Department did not issue denial notices during Bay State CAP conversion. Will Bay State CAP denial notices be issued in the future?

A: Yes. BEACON will issue a Bay State CAP denial letter when the SSI applicant/recipient:

- Has earned income;
- Does not meet the marital status requirement;
- Does not meet the living arrangement requirement;
- Does not meet the age requirement;
- Does not meet the noncitizen requirement; and
- Is permanently disqualified from the Food Stamp Program (FSP).

Exception: BEACON will not issue a denial letter to an SSI applicant/recipient whose regular FS benefit is higher than the Bay State CAP benefit. SSI applicants/recipients were notified on the Bay State CAP Statement and Bay State CAP brochure that there would be no denial in this situation.

PROCESS ISSUES - Continued

**Bay State
CAP Applicant
18-21 NOT
Receiving
Regular FS**

Q 16: When an 18-year-old SSI applicant/recipient living with her mother and **not receiving** FS benefits applies for Bay State CAP, will FSP household composition rules prevent the creation of a Bay State CAP AU once the SSI application/redetermination is approved?

A: No. The Bay State CAP waiver granted by USDA allows an SSI applicant/recipient between the ages of 18 and 21 to receive Bay State CAP benefits as a one-person household if he/she declares to purchase and prepare food *separately* from other household members.

**Bay State
CAP Applicant
18-21
Receiving
Regular FS**

Q 17: When an 18-year-old SSI applicant/recipient living with her mother and **receiving** FS benefits applies for Bay State CAP, will FSP household composition rules prevent the creation of a Bay State CAP AU once the SSI application/redetermination is approved?

A: Yes. BEACON will deny the Bay State CAP AU for failure to meet Bay State CAP household composition rules (Bay State CAP AUs are one-person households). The AU will continue to receive regular FS benefits.

**Earnings
Matches**

Q 18: How do I handle Earned Income Matches on Bay State CAP AUs?

A: Earned income is not countable for Bay State CAP AUs. An ongoing Bay State CAP AU may receive earned income for three months. The three months is automatically tracked in BEACON. Once SDX indicates that the AU has received earned income for three consecutive months, BEACON will switch the Bay State CAP AU to regular FS benefits.

A future BEACON enhancement will prevent Earned Income Matches from appearing on Bay State CAP AUs.

In the interim, AU Managers must disregard the Earned Income Match procedures located in *A User's Guide*, Chapter II, Section A. **Do not close the Bay State CAP AU.** Disposition Earned Income Matches on Bay State CAP AUs are as follows:

- Cooperated: Yes
- Countable: No
- Effect on AU: No Change

Questions

If you have any questions, please have your Hotline designee call the Policy Hotline at 617-348-8478.
