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*Executive Office of Health and Human Services*  
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**Field Operations Memo 2005-4**  
**January 14, 2005**

**To:** Transitional Assistance Office Staff  
**From:**  Cescia Derderian, Assistant Commissioner for Field Operations  
**Re:** **BAY STATE COMBINED APPLICATION PROJECT IMPLEMENTATION**

**Background**

The Commonwealth of Massachusetts Combined Application Project (Bay State CAP) has been developed through the cooperative effort of the Department of Transitional Assistance (DTA), the Social Security Administration (SSA), and the U.S. Department of Agriculture (USDA). The project is part of DTA's continued effort to increase participation in the Food Stamp Program (FSP). DTA and SSA realize that Supplemental Security Income (SSI) recipients are an underserved population. It is estimated that 68,000 SSI recipients in Massachusetts are eligible for but not receiving food stamp benefits. Nutritional assistance in the form of food stamps would be a vital benefit to this elderly and disabled population. Approximately 20,000 current SSI/FS recipients will be converted to Bay State CAP for February 2005 benefits. *See* Initial Bay State CAP Conversion section of this memo for details.

**Program Overview**

Effective 2/1/2005, information about SSI applicants/recipients gathered by SSA staff during the interview for application/redetermination of SSI benefits will be electronically transmitted to DTA through the existing State Data Exchange (SDX) system. This information will then be used by DTA to determine Bay State CAP eligibility once SSI is approved/redetermined.

If a *pure SSI household* appears eligible for food assistance, the SSA worker will ask three food assistance questions during the SSI application/redetermination interview. Bay State CAP benefits will be automatically issued following the SSI approval/redetermination, if the Bay State CAP eligibility criteria are met. To further simplify the application process for food assistance benefits:

- The SSI applicant/recipient is not required to visit a DTA office or have a telephone interview.
- The SSI applicant/recipient will not have to verify any information. All the information necessary to establish a Bay State CAP AU on BEACON will be transmitted to DTA through the SDX file.
- Bay State CAP benefits will be added to the EBT system.
- A Bay State Access Card and PIN will be mailed to the applicant/recipient.
- A notice will be sent informing the SSI recipient of Bay State CAP approval and the monthly benefit amount.

**Program  
Overview  
(Continued)**

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If the SSI approval/review process will take more than 30 days, the SSA worker will assist the applicant/recipient in completing the one-page food stamp application, FSP/SSA-1 Form. *See Attachment A.* The SSA worker will also ask SSI applicants/recipients the expedited service questions on the reverse side of the FSP/SSA-1 Form. The expedited box will be checked for those applicants/recipients who appear to qualify for expedited service. The completed FSP/SSA-1 Form will be faxed to the appropriate TAO. A DTA AU Manager will follow up with a telephone contact and process the application in accordance with guidelines at 106 CMR 366.920 and normal timeliness standards.

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**Bay State CAP  
Eligibility Criteria**

An SSI recipient is eligible for Bay State CAP if he/she:

- Is age 18 or older;
  - Is not married (*single, widowed, divorced or separated*);
  - Has a federal living arrangement code of A on SDX;
  - Has a state living arrangement code of either A or B on SDX;
  - Has no earned income;
  - Is a citizen, naturalized citizen, or eligible noncitizen based on FSP rules;
  - Declares to purchase and prepare food separately; and
  - Is not permanently disqualified from receiving FSP benefits
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**Bay State CAP  
Benefit  
Calculation**

Bay State CAP food assistance benefits will be calculated as follows:

- BEACON will use the applicant's actual SSI income as reported by SSA, as well as any other unearned income, as reported by SSA. This information is updated daily, so DTA will be able to process an accurate benefit each month.
  - All Bay State CAP AUs will receive the standard deduction of \$134.
  - BEACON will determine the Shelter Deduction for Bay State CAP AUs using SDX shelter information:
    - Households claiming shelter expenses greater than or equal to \$450 per month as determined by the SSA worker during the SSI interview will receive the **high shelter parameter amount** of \$450.
    - Households claiming shelter expenses less than \$450 per month will receive the **low shelter parameter amount** of \$220.
    - All Bay State CAP AUs will receive the **Bay State CAP Standard Utility Allowance (SUA)** of \$268.
  - To calculate the AU's shelter deduction, half of the adjusted gross income will be subtracted from the appropriate shelter parameter plus the Bay State CAP SUA. The difference is the shelter deduction for the AU.
  - BEACON will subtract the shelter deduction from the household's adjusted gross income to determine the household's net monthly income.
  - The net monthly income will be used to determine the Bay State CAP benefit amount in accordance with 106 CMR 364.600. Attachment B lists Sample Bay State CAP benefit amounts based on the type of SSA case (*elderly or disabled*) and SSA living arrangement code (*federal and state*) along with either the high or low shelter parameter.
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**Determining  
the Shelter  
Deduction**

**Bay State CAP  
Benefit  
Calculation  
(Continued)**

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**Treatment of Earned Income:** AUs with earned income are ineligible for Bay State CAP. However, AUs that receive earned income subsequent to participating in Bay State CAP will remain in the program until earned income is received for more than three consecutive months. Any earned income received by an AU while participating on Bay State CAP will be excluded from the Bay State CAP benefit calculation. Once a Bay State CAP household receives earned income for a fourth consecutive month, DTA will change the Bay State CAP AU to regular food stamp benefits.

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**THE BAY STATE CAP APPLICATION PROCESS**

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**SSA Claim  
Representative  
Responsibilities  
at Application**

SSA staff will be responsible for performing the activities described below. At the SSI application interview, SSA staff will determine if the SSI applicant appears eligible for food assistance benefits and is a *pure SSI household* in accordance with SSA rules.

- *If no*, the food assistance questions will not be asked.
- *If yes and the SSI approval process is expected to take 30 days or less*, the SSA worker will:
  - Ask the food assistance related questions during the full SSI interview;
  - Enter the appropriate high or low shelter parameter on SDX;
  - Describe the Bay State CAP project;
  - Provide the applicant with the Your Bay State CAP Food Assistance Benefits brochure (*see Attachment C*); and
  - Give the applicant a copy of the completed Bay State CAP Food Assistance Benefits Statement, FSP/BSC-1 Form (*see Attachment D*).
- *If yes and the SSI approval process is expected to take more than 30 days*, the SSA worker will:
  - Help the applicant complete the one-page application for regular FSP benefits, FSP/SSA-1 Form; and
  - Fax the completed FSP/SSA-1 Form to the appropriate TAO.

Once the applicant has been determined disabled, the SSA worker will complete the SSI interview process. As part of this interview, the SSA worker will:

- Ask the food assistance related questions;
- Enter the appropriate high or low shelter parameter on SDX;
- Describe the Bay State CAP project;
- Provide the applicant with Your Bay State CAP Food Assistance Benefits brochure; and
- Give the applicant a copy of the completed Bay State CAP Food Assistance Benefits Statement.

All *pure SSI households* will be asked the expedited screening questions. The SSA worker will indicate on the FSP/SSA-1 Form if an applicant appears to qualify for expedited service. The SSA worker will then assist in completion of the FSP/SSA-1 Form, if not already completed, and fax it to the appropriate TAO.

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## BEACON Action on Bay State CAP Applications

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The Bay State CAP application process at DTA is initiated once an SSI applicant, who has applied for Bay State CAP, has been approved for SSI. **The application is completed during the nightly BEACON batch processing with no AU Manager intervention.**

For newly approved SSI recipients identified on the SDX file as requesting Bay State CAP benefits, BEACON will perform name clearance using the SSI recipient's SSN.

- If the SSN is not found, BEACON will create a new assessed person and new *pending* FS AU.
- If the SSN is found, BEACON will match the SSI applicant to the existing Assessed Person.
  - If the SSN is matched to the grantee of an active FS AU, BEACON will determine Bay State CAP eligibility on the *existing* FS AU.
  - If the SSN is matched to anyone other than the grantee of an active FS AU, BEACON will create a pending FS AU and determine Bay State CAP eligibility on the *pending* FS AU.

**Note:** All assessed person, household and AU information necessary to process Bay State CAP benefits will be created from SDX data, existing BEACON data, and default values. The assessed person will be updated with SDX data for the demographic and income information shared by both systems. All data brought over from SDX will be automatically verified on BEACON as ***Electronically validated by SSA/SDX.***

BEACON will then perform a Bay State CAP nonfinancial eligibility determination for all *active* and *pending* FS AUs to determine if the Bay State CAP criteria are met.

*If the Bay State CAP criteria are not met*, BEACON will set the Bay State CAP status to Denied and generate a Bay State CAP Denial notice.

*If the Bay State CAP criteria is met and there is no active FS AU*, BEACON will:

- Switch the FS AU from *pending* to Active;
- Set the Bay State CAP status to Active;
- Calculate a Bay State CAP benefit amount. The benefit effective date will be the cyclical month following SSI approval;
- Assign the Bay State CAP AU to the appropriate AU Manager;
- Certify the AU for 36 months. The Food Stamp Application Date will be set to the SSI Approval Date;
- Generate a Bay State CAP Approval notice; and
- Mail a Bay State Access Card and PIN.

**Exception:** A request for a Bay State Access Card and PIN will not be sent if the applicant had an active FS AU in the previous four (4) months to which FS benefits were issued.

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**BEACON  
Action on Bay  
State CAP  
Applications  
(Continued)**

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*If the Bay State CAP criteria is met and there is an active FS AU, BEACON will:*

- Calculate a Bay State CAP benefit amount and compare the Bay State CAP benefit to the regular FS benefit amount.
  - If the Bay State CAP amount is greater, BEACON will:
    - keep the FS AU status as Active;
    - set the Bay State CAP status to Active;
    - assign the AU to an AU Manager based on address and alpha split for the appropriate Regional SSI TAO or to a TAO AU Manager if there are other associated eligibility units;
    - certify the AU for 36 months;
    - generate a Bay State CAP Approval notice; and
    - pay the new Bay State CAP benefit amount. The Food Stamp Application Date will be set to the SSI Approval Date.
  - If the regular FS benefit amount is greater, BEACON will:
    - set the Bay State CAP status to Denied;
    - continue to issue regular FS benefits; and
    - suppress the Denial notice. *There will be no Bay State CAP Denial notice sent in this situation. The Bay State CAP Food Assistance Benefits Statement and brochure inform SSI applicants/recipients that if regular FSP benefits are greater than Bay State CAP benefits, regular FSP benefits will be continued.*

**Deferred  
Application  
Processing  
Situations**

The Bay State CAP application process will be deferred for newly approved SSI applicants in the following situations:

- The SSI recipient is currently pending in an existing FS AU. Once the assessed person is no longer pending, the automated processing will be initiated.
- The SSI recipient is currently active in an existing FS AU with an “initiated” Recertification. The automated processing will be initiated once the recertification is completed.
- The SSI recipient is currently part of a pending EBC Request that will close the assessed person from an existing FS AU. The automated processing will be initiated once the request is released.
- The SSI recipient has a current nonpermanent disqualification. The automated processing will be initiated once the disqualification period ends.

**AU Manager  
Responsibilities  
for Bay State  
CAP  
Applications**

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**AU Managers have no responsibilities at application for a Bay State CAP AU.**

AU Managers can access the following views to monitor Bay State CAP AUs:

- TAO Office Explorer/Assistance Unit Lists/Active by Grantee Name
  - TAO Office Explorer/Appointments to Schedule/AUs Reassigned
  - TAO Office Explorer/Daily Priority Actions/Pending Applications/Reinstatements. For this view, a *Yes* will be displayed in the CAP column for pending Bay State CAP AUs.
  - TAO Office Explorer/Daily Priority Actions/Documents Sent For Past Week
  - The following notice types will be displayed under the Document column header for Bay State CAP AUs: Bay State CAP Approval, Bay State CAP Change, Bay State CAP Closing, Bay State CAP Denial, Bay State CAP Switch to Regular FS.
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**AU Manager  
Responsibilities  
for Bay State  
CAP  
Applications  
(Continued)**

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These values will also be displayed as the Notice Type within the Eligibility Explorer Results/Financials tab.

An informational message will be displayed when the Eligibility Explorer is accessed for a household containing an active Bay State CAP AU. The message reads: *This household contains a recipient in an active Bay State CAP FS AU. The Address, Assessed Person, Citizenship, Non-Citizen, Disability, Employment Status, Other Income Status, and Reinstatement windows are not available for update for CAP recipients. Changes to this information must be made at the Social Security Administration offices. All other interview windows are available for update. If you initiate a Recertification, all interview windows will be available, and the FS AU will be switched from CAP to a regular FS AU.*

A Bay State CAP Status field which indicates that the AU is Active, Closed or Denied was added to the following Windows and Views:

- AU Composition Results window;
- Interview Wrap-up EBC Results window on the FS Financial Tab/Standard Amounts caret;
- Eligibility Explorer Summary/Program tab within the FS/AU Data tab;
- Eligibility Explorer Results tab within the FS Financial Tab/Standard Amounts caret;
- TAO Office Explorer/Assistance Unit Lists/Active by Grantee Name View;
- TAO Office Explorer/Assistance Unit Lists/AUs Reassigned View; and
- TAO Office Explorer/Daily Priority Actions/Pending Applications/Reinstatements View. For this view, a *Yes* will be displayed in the CAP column to indicate a pending Bay State CAP status.

For an active Bay State CAP AU, the following windows will be available for **viewing** only: Address; Assessed Person; Citizenship; Non-Citizen; Disability; Employment Status; Other Income Status; and Reinstatement. **AU Managers will not be able to update these windows when in Case Maintenance mode. The Bay State CAP recipient should report changes to the information on these windows directly to SSA.** The information on these windows will be changed by the daily SDX update.

A new window available for **viewing** only was added to Program Administration. The **SDX Cap Inquiry** window will display data for all assessed persons with a history of Bay State CAP information. The information on this window is no longer updated once the Bay State CAP AU is closed.

An edit was added to the Apply for Assistance and AU Mandatory Responsible window to prevent adding a household member to a Bay State CAP AU. The message reads: *No household members may be added to a CAP Food Stamp AU unless you have initiated a recertification. Changes in household circumstances should be reported by the recipient to the Social Security Administration.*

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**AU Manager Responsibilities For Bay State CAP Applications (Continued)**

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Another edit was added to the Apply for Assistance and AU Mandatory Responsible window to prevent adding a Bay State CAP FS recipient to a regular FS AU. The message reads: *A Bay State CAP FS recipient cannot be added to a regular Food Stamp AU unless you have initiated a recertification. Changes in household circumstances should be reported by the recipient to the Social Security Administration.*

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**CASE MAINTENANCE ACTIVITIES**

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**Bay State CAP AU Reporting Responsibilities**

- Recipients of Bay State CAP **must** report changes in income or household circumstances to SSA in accordance with SSA rules.  
*Note:* When a recipient of Bay State CAP reports an income change, a household circumstance change or a new address, the AU Manager must refer the client to SSA. **The SSA phone number is 1-800-772-1213.**
  - Recipients of Bay State CAP **may** report shelter/utility costs, medical expenses over \$35 per month, or any other deductible FS expenses to DTA.
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**SDX Changes to Ongoing Bay State CAP AUs**

BEACON will automatically update Bay State CAP AUs without AU Manager intervention based on information received from SDX. BEACON will use the daily SDX file to:

- Update Bay State CAP recipient demographic information including *name, SSN, address, gender, race and language.*
  - Recalculate Bay State CAP benefits based on SDX income or shelter expense information.
    - A change from the High to Low Shelter Parameter;
    - A change from the Low to High Shelter Parameter; or
    - A change in an SDX unearned income amount.
  - Extend the current Bay State CAP recertification period an additional 36 months based on an SSI Redetermination.
  - Close Bay State CAP AUs in the following instances.
    - SDX information indicates that the recipient is an ineligible noncitizen based on FSP rules.
    - SDX information indicates that the recipient is a resident of a public or private institution.
    - SDX information indicates that the recipient is no longer a Massachusetts resident.
    - SDX information indicates that the recipient is deceased.
    - SDX information indicates that the recipient's whereabouts is unknown.
    - SDX information indicates that the recipient did not cooperate with a fraud investigation.
    - SDX information indicates that the recipient is receiving assistance in another state.
    - SDX information indicates that the recipient is a fleeing felon.
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**SDX Changes on Ongoing Bay State CAP AUs (Continued)**

- Switch Bay State CAP benefits to regular FSP benefits in the following instances.
  - Recipient requests through SDX that Bay State CAP stop.
  - Recipient no longer receives SSI for any reason except for the eight (8) reasons listed above.
  - Recipient's SDX Federal Living Arrangement Code is no longer A.
  - Recipient's SDX State Living Arrangement is no longer A or B.
  - Recipient has a Marital Status of Married.
  - Recipient is under age 18.
  - Recipient has had three (3) consecutive months of Earned Income.

BEACON will in these instances:

- ✓ Shorten the certification period to 90 days;
- ✓ Pay the current benefit amount;
- ✓ Set the Bay State CAP Status to Closed; and
- ✓ Send the recipient Bay State CAP Switch to Regular FS notice.

**AU Manager Entered Changes to Ongoing Bay State CAP AUs**

The following windows will be available for updates in case maintenance mode for Bay State CAP AUs: Shelter Expenses; Standard Utility Allowance; Health Insurance; Medical Expenses; Dependent Care Expenses; and Support Expenses.

- When a Bay State CAP recipient reports a shelter cost change, medical expenses or another deductible expense to DTA, the AU Manager must enter the expense information on BEACON. **The Bay State CAP recipient does not have to submit proof of the expense information.** The AU Manager **must** go to the Verification Tab and select the item to be verified, then, in the Verified With field select *Other (Specify)* and type *Bay State CAP Verification* in the Other field. Once the AU Manager processes the change in the Interview Wrapup window, BEACON will:
  - calculate the regular FS benefit using the changed or new expense information;
  - recalculate the Bay State CAP benefit using the information; and
  - compare the regular FS benefit to the Bay State CAP benefit amount.

**Scenario 1: If the regular FS benefit is greater, BEACON will:**

- ✓ Switch the Bay State CAP AU to regular FS benefits;
- ✓ Set the Bay State CAP Status to Closed;
- ✓ Shorten the certification period to 90 days;
- ✓ Pay the new higher regular FS benefit amount;
- ✓ Send the recipient a Bay State CAP Switch to Regular FS notice;
- ✓ Create a transaction to notify SSA that the AU is longer Bay State CAP; and
- ✓ Select the AU as part of the next timely case closing/recertification process.

**At recertification, the reported expense information along with all other eligibility information must be reviewed and verified.**

**Example 1:** A recipient lives in private housing and reported to SSA that her rent was over \$450. Her Bay State CAP benefit is calculated using the high shelter parameter plus the Bay State CAP SUA. She reports that her actual rent is \$500 and she pays for heat separately.

**Result:** Regular FS benefit is greater than Bay State CAP benefit.

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**AU Manager  
Entered Changes  
to Ongoing Bay  
State CAP AUs  
(Continued)**

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**Scenario 2: If the Bay State CAP benefit remains the same and is greater than the FS benefit, BEACON will continue paying the current Bay State CAP benefit.**

**Example 2:** A recipient living in subsidized housing reported to SSA that she pays less than \$450 for rent. Her Bay State CAP benefit was calculated using the low shelter parameter of \$220 plus the Bay State CAP SUA. The recipient reports that her new rent is \$300 including utilities.

**Result:** The FS benefit calculated using \$300 for shelter and no SUA would be lower than the current Bay State CAP benefit. The Bay State CAP benefit will be continued.

**Scenario 3: If the Bay State CAP benefit changes (a change from the high to low shelter parameter or the low to high shelter parameter ), BEACON will:**

- ✓ Pay the new Bay State CAP benefit;
- ✓ Send a Bay State CAP Change notice; and
- ✓ Create a transaction to notify SSA of the shelter expense change within Bay State CAP.

**Example 3:** A recipient paying \$500 including utilities reported to SSA that he paid more than \$450 for rent. His Bay State CAP benefit was calculated using the high shelter parameter of \$450 plus the Bay State CAP SUA. The recipient reports he now lives in subsidized housing and pays \$250 for rent plus utilities.

**Result:** The Bay State CAP benefit has changed (using the low shelter parameter) but is greater than the calculated regular FS benefit.

The following changes were made on the What If window to support the Bay State CAP financial calculation:

- A *Request CAP* checkbox was added to the Assistant Unit tab.
- A *CAP Shelter* radio button group with selections of “High” and “Low” was added to the Assistant Unit tab.
- The CAP (Status) field was added below the “Categorically Eligible Reason” field on the FS Standard Amount caret on the Calculation tab.

AU Managers may use the What If functionality to determine if reported expense information will impact the Bay State CAP benefit level or eligibility

AU Manager initiated closings of Bay State CAP AUs are limited. Only the following **five reasons** will be available for selection by the user:

<i>Reason Category</i>	<i>Reason</i>
Noncooperation	Did not cooperate with Quality Control
Noncooperation	Fail to schedule a review at end of disqualification period
Admin-TAO	Administrative Closure
Admin-TAO	Special Projects
Admin-CO	FS Disqualification for Intentional Program Violation.

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**THE BAY STATE CAP RECERTIFICATION PROCESS**

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**SSA Claim  
Representative  
Responsibilities  
At  
Redetermination  
(Continued)**

SSA staff will be responsible for performing the activities described below. At the SSI redetermination interview, SSA staff will determine if the SSI recipient appears eligible for/currently receives food assistance benefits and is a pure SSI household in accordance with SSA rules.

- *If the SSI redetermination is expected to take 30 days or less*, the SSA worker will:
  - Ask the food assistance questions during the redetermination interview;
  - Enter the appropriate high or low shelter parameter on SDX;
  - Describe the Bay State CAP project;
  - Provide the applicant with the Your Bay State CAP Food Assistance Benefits brochure; and
  - Give the applicant a copy of the completed Bay State CAP Food Assistance Benefits Statement.
- *If the SSI redetermination is expected to take more than 30 days*, the SSA worker will:
  - Help the applicant complete the, FSP/SSA-1 Form; and
  - Fax the completed FSP/SSA-1 Form to the appropriate TAO.

Once the recipient has been determined disabled, the SSA worker will complete the SSI redetermination process. As part of this interview, the SSA worker will:

- Ask the food assistance questions;
- Enter the appropriate high or low shelter parameter on SDX;
- Describe the Bay State CAP project;
- Provide the applicant with the Your Bay State CAP Food Assistance Benefits brochure; and
- Give the applicant a copy of the completed Bay State CAP Food Assistance Benefits Statement.

If the recipient is a *pure SSI household* not currently on food assistance benefits, the expedited screening questions will be asked. The SSA worker will indicate on the FSP/SSA-1 Form if an applicant appears to qualify for expedited service. The SSA worker will then assist in completion of the FSP-SSA-1, if not already completed, and fax it to the appropriate TAO.

**DTA  
Responsibilities  
at Recertification**

- BEACON will automatically recertify Bay State CAP AUs if SDX indicates that an SSI redetermination has been completed. BEACON will set a new 36 month certification period and send a recertification notice to the recertified Bay State CAP AU. There will be no interruption of Bay State CAP benefits if the SSI redetermination occurs within the 36 month certification period.
- A timely case closing notice will be sent to Bay State CAP AUs if an SSI redetermination has not been completed by the 34<sup>th</sup> month of the certification period. The AU Manager will be responsible for processing the recertification of the Bay State CAP AU.

An informational message will be displayed on the Reevaluation window when the *Initiate* button is selected for an active BAY STATE CAP FS AU stating: *If you initiate a Recertification on a Bay State CAP FS AU, all interview windows will be available, and the FS AU will be switched from Bay State CAP to a regular FS AU.*

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**DTA  
Responsibilities  
at Recertification  
(Continued)**

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The following Interview Wrapup edit was added to prevent the selection of the Authorization button for an Interview Wrapup Request that contains a Bay State CAP AU with an *initiate* Recertification if the *Reevaluation* checkbox was not selected on the Selection window. *The request cannot be authorized until the Recertification is completed on the Bay State CAP FS AU, and you click the Reevaluation box on the Interview Wrapup Selection window.*

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**Initial  
Bay State CAP  
Conversion**

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**CONVERSION OF CURRENT SSI/FS AU TO BAY STATE CAP**

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All existing SSI/FS AUs meeting Bay State CAP criteria that would receive higher benefits under Bay State CAP will be switched from regular FS benefits to Bay State CAP benefits in accordance with the attached schedule. *See Attachment E.* Approximately 20,000 AUs will be converted. BEACON will:

- Identify all active FS AUs that meet Bay State CAP criteria;
  - Calculate a Bay State CAP benefit and compare it to the regular FSP benefit.
    - If the Bay State CAP benefit is higher, BEACON will:
      - Set the Bay State CAP Status to Active;
      - Extend the certification period to a maximum of 36 months;
      - Send a Bay State CAP Conversion notice;
      - Assign the Bay State CAP AU to the appropriate AU Manager.
        - √ If the AU was in a Regional SSI Office, the AU will remain with the current AU Manager.
        - √ If the AU was in a TAO and will be transferred to a Regional SSI Office, the AU will be assigned to a Regional SSI Office AU Manager based on alpha split.
        - √ If the AU was in a TAO and will remain in the TAO (due to related HHs), the AU will remain with the current AU Manager.
- Note:** Most Bay State CAP recipients will be assigned to an AU Manager in a Regional SSI Office. Bay State CAP AUs will be assigned to an AU Manager in a TAO if there is a related household serviced by the TAO.
- Create a transaction to notify SSA that the AU is now Bay State CAP.
  - If the regular food stamp benefits are higher, BEACON will not convert the regular FS AU. For these AUs,
    - The Bay State CAP Status will set to Denied; and
    - No notice will be produced.

**Outreach**

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**OUTREACH TO SSI-ONLY RECIPIENTS MEETING BAY STATE CAP CRITERIA**

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DTA will outreach to current SSI recipients not receiving food stamp benefits either through:

- A systematic mailing of Bay State CAP packets to SSI recipients; or
- Automatic enrollment of SSI recipients who meet Bay State CAP eligibility criteria.

The Outreach Plan is being finalized at Central Office. Outreach efforts will be the subject of a future Field Operations Memo.

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**Termination of  
Quarterly  
Issuance**

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Effective in January 2005, the Department stopped issuing FS benefits on a quarterly basis to SSI recipients eligible for \$10.00 per month. With the implementation of Bay State CAP most SSI recipients will be eligible for monthly FS benefits of more than \$10.00 per month. The cost savings of Quarterly Issuance was significantly reduced due to the Bay State CAP initiative.

**Questions**

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

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## Department of Transitional Assistance

# APPLICATION FOR FOOD STAMP BENEFITS

### (For Pure SSI Households)

Qualified for Expedited (see reverse)

Source: SSA

Last Name:		First Name:		M.I.	Social Security Number:	
Date of Birth: / /		Gender: M F	Preferred Language:			
Current Address:						
Number and Street:		Apt. No.	City	State:	ZIP	
Mailing Address (If Different)				Telephone Number:		
You are living in a:						
Private Housing		Residential Housing		Teen Living Program		
Public Housing		Commercial Boarding House		Migrant Camp Site		
Transitional Housing		Employer Provided Housing		Shelter		
Are You Homeless?						Yes No
How many people live in your household (not including yourself) ?						
						Yes No
1. Do you want to give permission to someone else to apply or get food stamp benefits for you? .....						
Last Name:		First Name:		M.I.	Phone Number:	
Address:						
2. Is anyone in your household pregnant? .....						
3. Is there a child in your household who is not your child, who is under 18, and who is not under your control and supervision? .....						
4. Is anyone in your household a boarder? .....						
5. Are foster care payments being made for anyone in your household? .....						
6. Is anyone in your household NOT a resident of Massachusetts or intending to leave Massachusetts? .....						
7. Is anyone in your household NOT a U.S. citizen? .....						
8. Does anyone in your household want to register to vote? .....						
9. Is anyone in your household physically or mentally disabled? .....						
10. Is anyone in your household currently working or has worked at anytime in the last sixty days? .....						
11. Is anyone in your household eligible to receive or receiving any other type of income such as child support, Social Security, Workers' Compensation, Veterans Benefits? .....						
12. Does anyone in your household have a legal obligation to pay child support to someone not living in the household? .....						
13. Does anyone in your household have child or adult day care expenses? .....						
14. Does anyone in your household have health insurance? .....						
15. Does anyone in your household who is 60 or older or is disabled have out-of-pocket medical expenses? .....						
						Yes No
16. What type of shelter expenses do you have?		Rent/Mortgage .....				
		Property Taxes .....				
		Others .....				
17. Do you pay for:						
Heating and/or air conditioning costs separately from your rent/mortgage						
Any other utilities (not including heating/air conditioning)						
A telephone, including cellular phone						
18. Have you received or do you think you will receive Fuel Assistance payments? .....						
_____						/ /
Applicant Signature						Date

**Department of Transitional Assistance**  
**APPLICATION FOR FOOD STAMP BENEFITS**  
**(For Pure SSI Households)**

IF YOU NEED FOOD STAMP BENEFITS RIGHT AWAY (WITHIN 7 DAYS) AND YOU MEET ANY OF THE FOLLOWING (*check appropriate boxes*):

Your income and money in the bank add up to less than your monthly housing expense; or

Your monthly income is \$150 or less and your money in the bank is \$100 or less; or

You are a migrant worker and your money in the bank is \$100 or less

You should call us at **1-800-249-2007** or go to the office that serves your area.

## Sample Bay State CAP Calculations

Elder L/A=A		
SSI	\$692.82	\$692.82
Shelter Standard	High \$450	Low \$220
SUA	\$268	\$268
Maximum	\$149	\$149
<b>Benefit</b>	<b>\$113</b>	<b>\$44</b>

Disabled L/A=A		
SSI	\$678.39	\$678.30
Shelter Standard	High \$450	Low \$220
SUA	\$268	\$268
Maximum	\$149	\$149
<b>Benefit</b>	<b>\$119</b>	<b>\$50</b>

Elder L/A=B		
SSI	\$603.26	\$603.26
Shelter Standard	High \$450	Low \$220
SUA	\$268	\$268
Maximum	\$149	\$149
<b>Benefit</b>	<b>\$149</b>	<b>\$84</b>

Disabled L/A=B		
SSI	\$594.40	\$594.40
Shelter Standard	High \$450	Low \$220
SUA	\$268	\$268
Maximum	\$149	\$149
<b>Benefit</b>	<b>\$149</b>	<b>\$88</b>

## What happens if my application for SSI is denied?

- If your application for SSI is denied, your application for Bay State CAP food assistance benefits is automatically denied at the same time.
- You will not be sent a separate notice telling you that your application for Bay State CAP has been denied.
- You may still be able to get regular food assistance benefits.

If you want to apply for regular food assistance benefits, contact your local DTA office. If you don't know where your office is located or you wish to get a food stamp application form, please call the Application Info line at 1-800-249-2007.

# Your Bay State CAP Food Assistance Benefits

Commonwealth of Massachusetts  
Department of Transitional Assistance

FSP/BSC-2(2/2005)  
09-520-0205-05





## **What is Bay State CAP food assistance?**

Bay State CAP is a program designed to make it easy for you to get food assistance if you get Supplemental Security Income (SSI). Your application/redetermination interview for SSI is also your application/redetermination for food assistance. The Social Security Administration (SSA) gives us all the information we need to give you food assistance benefits.

## **What are the benefits of Bay State CAP?**

- Your interview for SSI is your interview for food assistance benefits.
- You don't have to fill out any additional forms.
- You don't have to go our office or talk to us.
- You don't have to give us copies of your personal records.
- Your food assistance benefits go into a special account, and we send you a card to use when you buy groceries. The card works just like a bank debit card.

## **Who is eligible for Bay State CAP food assistance benefits?**

You can get Bay State CAP food assistance benefits if you get SSI and you:

- Are at least 18 years old; and
- Live alone, or buy and prepare your food separately from the other people who live with you; and

- Are not living with a spouse or children; and
- Are not working.

## **Do I have to get my food assistance through Bay State CAP?**

No. You can choose to get regular food assistance benefits if your regular benefits would be greater than your Bay State CAP benefits. Your regular food assistance benefits might be greater if you:

- Pay an increased amount for your shelter (rent/mortgage);
- Pay heating or air conditioning costs separately from your rent/mortgage;
- Pay more than \$35 a month in out-of-pocket medical expenses;
- Pay for child or adult dependent care; or
- Pay child support for a child outside your home.

## **What are your rights and responsibilities?**

- You are required to report to SSA changes in your circumstances that may affect your eligibility for and the amount of your SSI payments. This information will also be used for your Bay State CAP benefits. Report changes to SSA by calling 1-800-772-1213 or by visiting your local Social Security Office.

- You may report household expense changes to your Department of Transitional Assistance (DTA) case manager. You might receive more benefits if your shelter costs (rent/mortgage) increase, you pay heating or air conditioning costs separate from your rent/mortgage, you pay out-of-pocket medical expenses greater than \$35 a month, you pay child support for a child outside your home, or you pay for child/adult dependent care.

## **Can I apply for regular food assistance benefits while I'm waiting for SSI approval?**

Yes, you may apply for regular food assistance benefits at the SSA office when you initiate an application for SSI, or you may apply at the appropriate DTA office.

## **What happens if I'm getting regular food assistance benefits when my SSI is approved?**

- If your Bay State CAP benefits would be greater, you will be switched to Bay State CAP.
- If your regular food assistance benefits would be greater, you will continue to receive regular food assistance benefits.



Department of Transitional Assistance  
Bay State CAP Food Assistance Benefits Statement  
(For Pure SSI Households)

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Name of Food Assistance Applicant	Social Security Number	Date
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SSA has determined that I may be eligible for Bay State CAP food assistance benefits. I am:

- eligible (or potentially eligible) for SSI benefits; and
  - at least 18 years old; and
  - not living with a spouse or children; and
  - not receiving earned income; and
  - residing alone or purchasing and preparing my food separately from any other people who reside at the same address.
- 

My monthly housing cost, not including utility bills, is:

\$450 or more a month

Less than \$450 a month

I understand that I can choose to get regular food assistance benefits at any time if I would get a higher benefit amount than the Bay State CAP amount. The regular amount might be higher if I:

- Pay a higher amount for my shelter;
- Pay heating or air conditioning costs separately from my rent/mortgage;
- Pay more than \$35 a month in out-of-pocket medical expenses;
- Pay for child or adult dependent care; or
- Pay child support for a child outside my home.

I also understand that:

- I can apply for regular food assistance while waiting for a decision on my SSI application.
- If I am receiving regular food assistance when my SSI application is approved, I will be automatically switched to Bay State CAP food assistance if the benefit amount would be higher. If my regular food assistance benefit amount would be higher, I will continue to receive regular food assistance.
- If my application for SSI is denied, this constitutes a denial of my application for Bay State CAP. I may, however, be eligible for regular food assistance.

I have been told about Bay State CAP and have been given the Bay State CAP brochure, which explains my rights and responsibilities.

2005-4  
Attachment E

Bay State CAP Conversion Schedule			
Ending SSN	Conversion Date	Conversion Notice	Initial Bay State CAP Benefit Issued
0	1/26	1/27	2/1
1	1/26	1/27	2/2
2	1/31	2/1	2/4
3	1/31	2/1	2/5
4	2/2	2/3	2/7
5	2/3	2/4	2/8
6	2/4	2/5	2/10
7	2/7	2/8	2/11
8	2/8	2/9	2/13
9	2/8	2/9	2/14