



Commonwealth of Massachusetts
Executive Office of Health and Human Services
Department of Transitional Assistance
 600 Washington Street • Boston, MA 02111


MITT ROMNEY
Governor

TIMOTHY MURPHY
Secretary

KERRY HEALEY
Lieutenant Governor

JOHN A. WAGNER
Commissioner

Field Operations Memo 2005-43
August 31, 2005

To: Transitional Assistance Office Staff
From:  Cescia Derderian, Assistant Commissioner for Field Operations
Re: Increase to the EA Eligibility Standard

Overview

The FY06 budget has been approved. As a result, effective July 1, 2005, the EA Eligibility Standard has been increased to 130% of the Federal Poverty Level. As of July 26, 2005, the July 1, 2005 EA Eligibility Standard was used in the EBC in BEACON for applications and reevaluations.

EA Eligibility Standard as of July 1, 2005

<u>AU Size</u>	<u>EA Eligibility Standard</u>
1	\$ 1037
2	1390
3	1744
4	2097
5	2450
6	2803
7	3156
8	3509
9	3863
10	4216
incremental	354

Purpose of Memo

This memo provides information relative to:

- Noticing the applicant who was denied EA benefits for excess income between July 1 and July 25, 2005. The notice will inform the applicant of the July 1, 2005, EA Eligibility Standard and advise the applicant to return to the TAO if he or she wishes to reapply for EA benefits;
- Reviewing EA AUs who were changed to EA Six Months AUs between July 1 and July 25 because the AU's income was calculated before the increased July 1, 2005 EA Eligibility Standard was used in BEACON; and
- Calculating the correct escrow amount for an EA Six Months AU that was created before and after July 1, 2005.

**Review Denied
EA AUs and EA
Six Months AUs
Since
July 1, 2005**

A list of names of the EA AUs affected by this change will be sent to TAOs by Central Office upon issuance of this memo. The first group lists the denied EA AUs and the second group identifies the EA Six Months AUs. The following TAOs have an AU on the list: Boston Family Housing, Brockton, Davis Square, Dorchester, Fall River, Framingham, Hyannis, Lowell, Newmarket Square, North Shore, Springfield/Liberty and Worcester.

Denied EA AUs

The AU Manager or Homeless Coordinator must:

- Send a notice (Attachment A) to the denied EA AU. The notice advises the family of a change to the EA Eligibility Standard, effective July 1, 2005, which could affect the original EA eligibility results. The family is advised to return to the TAO if the family wishes to reapply for EA benefits;
- Complete a new EA application if the family returns to the TAO to reapply;
- Proceed to the Interview Wrap-up, click on EBC results, calculate EBC, update, and close. BEACON will determine the family's eligibility using the family's income, comparing it to the July 1, 2005 EA Eligibility Standard;
- Click on the Authorization button, click on Update to set the record to pending release, and click on Finish to send the pending transaction for approval or denial;
- Send an NFL-9 notifying the family of the approval or denial; and
- Take appropriate steps to find shelter placement for an approved EA AU.

EA Six Months AUs

Because the pre-July 1, 2005, EA Eligibility Standard was used to determine financial eligibility for EA benefits, the EA AUs who were converted to EA Six Months AUs fall into two groups:

- EA AUs whose income does not exceed the new EA Eligibility Standard effective July 1, 2005, should be changed back to EA Regular AUs; and
 - EA AUs whose income does exceed the new EA Eligibility Standard effective July 1, 2005. These EA AUs were correctly converted to an EA Six Months AU, but were noticed with the pre-July 1 EA Eligibility Standards. They must be issued a notice using the new EA Eligibility Standard effective July 1, 2005.
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**Review Denied
EA AUs and EA
Six Months AUs
Since
July 1, 2005
(continued)**

To correct the EA Six Months AUs' records, the TAO Director or Assistant Director must:

- change the status of the EA AU to an EA Regular AU; and
 - calculate the EA AUs' financial eligibility in BEACON to allow a systems-generated notice reflecting the current EA Eligibility Standards.
-

**Changing
EA Six Months
AU Back to EA
Regular AU**

Only the TAO Director has the security clearance to authorize changing an EA Six-Months AU back to an EA Regular AU. Before the EA AU is referred to the Director, the AU Manager or Homeless Coordinator must:

- Compare the EA AU's total income to the July EA Eligibility Standard to determine if the income does or does not exceed the July EA Eligibility Standard. Go to Results tab, select the EA Six Months record, click on the Financial tab, and total all the income for the EA AU. Manually compare the total income to the July EA Eligibility Standard for the AU size. This step alerts the worker to the expected outcome; and
- Complete a review of the AU record to identify if there is another reason which prohibits the return of the EA AU to an EA Regular case, such as the EA AU is now closed for another reason or the original income used in the calculation was incorrect and has been corrected.

For EA AUs changing from EA Six Months AUs back to EA Regular AUs, the TAO Director or Assistant Director must:

- Select the EA AU record;
- Go to the Updates tab on the Interview Wrap-up EBC Results window;
 - Click on the dropdown box by the Reevaluation Type and select Reevaluation. Click the Update button. This changes the Sub Type from EA Six Months Escrow Period to Reevaluation;
 - A message will pop up: "The Reevaluation Subtype has been changed on the Emergency Assistance AU. Please recalculate". Click the OK button;
 - Click on the Calculate button again. Click on the Close button;
- At the Interview Wrap-up Authorization window, authorize the request. Click on the Authorization button;
- At the Interview Wrap-up window, Click on Update to set the record to 'Pending Release';
- Click on Finish to authorize the change; and
- Enter a message on the Narratives tab that the EA AU has been changed back to an EA Regular AU.

Note: If the EA AU reverts back to an EA Regular AU, the AU Manager or Homeless Coordinator must send a notice (Attachment B) to the EA AU explaining that the shelter benefits are not scheduled to end in six months, as previously noticed in July.

**EA AUs to
Remain EA Six
Months AUs**

For the EA AUs that will continue to be EA Six-Months AUs using the new eligibility standards, the following two-day procedure must be followed:

Day One

Day One – changing EA Six Months AU back to EA Regular AU

**Director/AD
Responsibilities**

The TAO Director or Assistant Director must:

- Change the countable income indicator:
 - Go to the Employment Status window, select the active employment, and change the **countable cash** indicator from ‘yes’ to ‘no’;
 - Go to the Other Income Status window, select the active employment, and change the **countable EA** indicator from ‘yes’ to ‘no’;
- Go to the Verifications Tab. The actions stated above will require “verification.” Click on “other” and enter the following text: “Special Recalculation 7/2005 Budget” as the verification;
- Go to the Interview Wrap-up window:
 - Click on the Selection button;
 - Select the income that has been made noncountable on the Interview Wrap-up Selection window and click on the Close button;
 - Click on the EBC Results button;
 - Click on the Calculate button on the Interview Wrap-up EBC Results window;
 - Select the EA record;
 - Click on the Update tab;
 - Click on the dropdown box by the Reevaluation Type to click on Reevaluation. This changes the Sub Type from EA Six Months Escrow Period;
 - Click the Update button;
 - A message will pop up: “The Reevaluation Subtype has been changed on the Emergency Assistance AU. Please recalculate”. Click the OK button;
 - Click on the Calculate button again. Click on the Close button;
- Click on the Add button on the Interview Wrap-up window;
- At the Interview Wrap-up Authorization window authorize the request by clicking on the Authorization button;
- At the Interview Wrap-up window, Click on Update to set the record to ‘Pending Release’; and
- Click on Finish to authorize the change.

Note: If there is an associated TAFDC or FS AU suppress the notice of change to the benefit effective date.

Day Two

Day Two – recalculating and changing to EA Six Months AU

**Homeless
Coordinator / AU
Manager
Responsibilities**

To produce an accurate calculation of the EA AU's income, after the Director or Assistant Director changes the EA AU back to an EA Regular AU, the AU Manager or Homeless Coordinator must:

- Change the countable income indicator:
 - Go to the Employment Status window, select the active employment, and change the **countable cash** indicator from 'no' to 'yes';
 - Go to the Other Income Status window, select the active employment, and change the **countable EA** indicator from 'no' to 'yes';
- Go to the Verifications Tab. The actions stated above will require "verification". Click on "other" and enter text: "Special Recalculation 7/2005 Budget" as the verification;
- Go to the Interview Wrap-up window:
 - Select the EA AU record;
 - Click on the Selection button;
 - Select the income that has been made countable on the Interview Wrap-up Selection window and click on the Close button;
 - Click on the EBC Results button;
 - Click on the Calculate button on the Interview Wrap-up EBC Results window;
 - Select the EA record;
 - Click on the Update tab;
 - Click on the Close button;
 - Click on the Add button on the Interview Wrap-up window;
 - Click on the Authorization button;
 - Check Approved;
 - Click on the Close button;
 - Select Finish to authorize the change.
- Enter a message on the Narratives tab that the EA AU has been changed back to an EA Regular AU.

Note: If there is an associated TAFDC or FS AU suppress the notice of change to the benefit effective date.

If the EA AU is ineligible due to excess income, it will show as an EA Six Months SubType, and the Reevaluation Type will be EA Six Months Escrow Period.

**Day Two
(continued)**

**Homeless
Coordinator / AU
Manager
Responsibilities**

A system-generated EBC notice will be sent advising the EA AU that the family's income is above the EA Eligibility Standard (the July 2005 standard) and that the EA AU will continue to receive shelter for the next six months (a new six-month period), unless the EA AU becomes ineligible for another reason. Since this will be the second notice related to six months continuation of shelter that will be sent to the EA AU, the AU Manager or Homeless Coordinator must contact the EA AU and explain that the second six-month notice:

- makes the first notice obsolete;
- advises the client of the start of a new six month continuation of shelter.

**EA Six Months
AUs Before
July 1, 2005**

The increased EA Eligibility Standard, effective July 1, 2005, does not impact an EA AU that became an EA Six Months SubType before July 1, 2005.

An EA AU who was changed to an EA Six Months SubType before July 1, 2005, will remain an EA Six Months AU. The EA AU's escrow amount is based on the EA Eligibility Standard in effect before July 1, 2005. **Do not use the July 1, 2005 increased EA Eligibility Standard to calculate the EA AU's escrow amount.**

Example: in May 2005, the total gross income of \$1963 was above the Standard of \$1613 (AU 4). The escrow amount is \$350. Although the Standard has been increased to \$2097 as of July 1, the EA AU continues to be an EA Six Months AU and the escrow amount continues to be based on the pre-July 1, 2005, EA Eligibility Standard amount of \$1613.

Pre-July 1, 2005, EA Eligibility Standard

<u>AU Size</u>	<u>EA Eligibility Standard</u>
1	\$ 798
2	1070
3	1341
4	1613
5	1885
6	2156
7	2428
8	2700
9	2971
10	3243
incremental	272

Questions

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

If you have any difficulty with the workarounds, please call Customer Support Services at 617-348-5290.



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Date _____

To _____

Dear _____,

Our records show that you made an application for Emergency Assistance between July 1, 2005 and July 25, 2005. At that time, you were told that your family was not eligible for Emergency Assistance because your family's income was above the eligibility standard for Emergency Assistance.

There is a new state budget for fiscal year 2006. The new budget allows the Department to increase the EA Eligibility Standard as of July 1, 2005. The higher amounts mean that you may be eligible for Emergency Assistance benefits.

If you wish to reapply for Emergency Assistance, please come to your local Transitional Assistance Office at

Please call your worker _____ at _____ if you have any questions about this notice.



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Date _____

To _____

Dear _____,

There is a new state budget for fiscal year 2006. The new budget allows the Department to increase the EA Eligibility Standard as of July 1, 2005.

Our records show that between July 1, 2005 and July 25, 2005 you were sent an *EA Six-Month Extension* notice from the Department that explained that your income was above the EA Eligibility Standard and that your shelter benefits are scheduled to end in six months.

The Department compared your family's income to the increased EA Eligibility Standard and found that your income no longer exceeds the increased EA Eligibility Standard.

Please disregard the EA Six-Month Extension letter you previously received. Your shelter benefits are not scheduled to end in six months and at this time you are financially eligible for EA. You must continue to follow the shelter rules and activities in your Self-Sufficiency Plan, as well as work with the HAP provider in finding permanent housing.

Please call your worker _____ at _____ if you have any questions about this notice.