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Field Operations Memo 2006-16
March 10, 2006

To: **Transitional Assistance Office Staff**

From: **Cescia Derderian, Assistant Commissioner for Field Operations**

Re: **TAFDC – Other Parent Indicator/Relationship Window Clean-up Project**

Background

In preparation for getting better data for Federal Work Program Participation Rates, changes are being made to BEACON with Increment 2.1.19.

Purpose of Memo

This Field Operations Memo informs TAO Staff about the changes to BEACON and a clean-up project that must be completed prior to Increment 2.1.19, on March 27, 2006.

AU Managers **must** ensure that the correct relationship is being set for each household member to ensure that adult household members are not set erroneously as children and children are not set as parents. AU Managers must check the relationship of *each* member in the AU to the grantee of the AU for accuracy. Then AU Managers must check the relationship for *each* member to the other members of the household. Correct the relationship, as necessary following procedures outlined later in this memo.

A report listing the approximately 400 affected AUs is being sent with this Field Operations Memo. AU Managers must code the report with the action taken and fax the annotated report back to Julie Noble at 617-348-5659 by **03/24/2006.**

Changes to BEACON

Those changes being made to BEACON with Increment 2.1.19 are:

✓ any person with an Other Parent (OP) check-box checked off on the Results tab of the AU Composition Results window who does not meet the definition of other parent (that is, parent of a child *in common* with the grantee and relationship of "spouse", "unrelated" or "other relationship" to the grantee) will have their OP indicator un-checked as a *one-time* data-fix by MIS;

✓ the nightly batch job, which closes all *active* dependent children who have reached their nineteenth birthday, will now also close *ineligible* dependent children who have reached their nineteenth birthday. A one-time data-fix will be run to close *ineligible* APs 19 and older who do not have their OP indicator checked; and

✓ edits on the AU Composition results window that will remind AU Managers to check the relationship of the person for whom the Other Parent check box is being checked The following edits are in place for the Other Parent (OP) situations noted:

♦ If the AU Manager selects the OP indicator for an AP who does not meet the OP definition, the following edit will appear when exiting the window: "_____(AP name) does not qualify as an Other Parent. Please review the information in the Personal Relationships Window and the AU Mandatory Responsible Window." The AU Manager must either uncheck the OP indicator or Cancel and not try to save the data in order to exit the window to check the data.

♦ If the AU Manager does not check the OP indicator for an AP that meets the OP definition, the AU Manager will receive the following message: "Information from the Personal Relationships Window and the AU Mandatory Responsible Window indicate that _____ (AP Name) is an Other Parent. Please check the Other Parent check box or review these windows." The AU Manager should check the OP indicator unless the user has reason to believe the data is incorrect, then he/she must Cancel out of the window to exit.

♦ If the AU Manager tries to select the OP indicator for more than one AP, the following edit appears "Only one Other Parent can be checked per AU. Please exit and review the information in the Personal Relationships Window and the AU Mandatory Responsible Window for _____ (AP Name) and _____ (AP Name)." If there is only one OP in the AU, the AU Manager must uncheck one of the OP indicators. If there <u>are</u> two OPs in the AU, click Cancel and exit the window. In this situation, the Hotline designee must call the MIS Help Desk for assistance.

AU Manager's Responsibilities: Correcting the Relationship Window

The majority of the APs on the report must have their relationship to other members in the AU set properly. This must be done on the Personal Relationships window.

The Personal Relationships window is found in the AU Composition section on the Eligibility Explorer. This window captures information about:

- the relationship of each household member to the Primary Applicant/ Grantee; and

- the relationship of the household members to one another.

When setting personal relationships, it is important to remember that the relationship must be that of the household member in the Personal Relationship tab to the household member selected from clicking on "Member List" below the window Title Bar. Once selected, the selected person's name will appear in the window Title Bar.

AU Manager's Responsibilities: Correcting the Relationship Window: *Example*

Mary Smith is a grantee in a household consisting of herself, her husband Paul, their son Jimmy, and her daughter Sally from a previous marriage.

Mary's relationship to everyone is set from the Household Composition window. The Personal Relationships window is used to set everyone's relationship in the household to every other person in the household. Thus:

- Select Paul and drag down into the Personal Relationship tab (note Mary's name in the Title Bar), set as *Spouse* and click Update. The Start Date field defaults to the current date and records the date that the relationship was adjusted on this window. This process will also automatically set Mary's relationship to Paul as *Spouse.*

- Following the procedure described above, select and set Jimmy as *Child* and Sally as *Child*. This process will also automatically set Mary's relationship to Jimmy and Sally as *Mother*.

- From the member list select Paul. Paul's name will now appear in the title bar.

AU Manager's Responsibilities: Correcting the Relationship Window: *Example (continued)*

- Using the same procedure, select and set Jimmy as *Child* and Sally as *Stepchild*. This process will also automatically set Paul's relationship to Jimmy as *Father* and to Sally as *Stepfather*. Remember to click on "Update" each time a relationship is set.

- From the Member List select Jimmy. Jimmy's name will now appear in the title bar.

- Using the same procedure, select and set Sally as *Half-Sibling*. This process will also automatically set Jimmy's relationship to Sally as *Half-Sibling*.

AU Manager's Responsibilities: Correcting the Relationship Window: *Final Reminders*

If a change is made to relationship(s), the AU Manager must determine if the OP indictor is correctly checked (that it does meet the definition of other parent: parent of a child *in common* with the grantee and relationship of "spouse", "unrelated" or "other relationship" to the grantee). If not, the AU Manager must uncheck the OP indicator.

If the OP indicator is unchecked and the AP is a dependent child, AU Managers must also remember to review the Work Program requirement window to add the appropriate reason for the Work Program requirement reason. If the OP indicator is unchecked and the AP is an adult, "adult" Work Requirement reasons will not be selectable. This issue is being worked on and procedures will be sent out shortly. TAOs affected have been notified about the 13 AUs that are impacted by this change.

These changes must be authorized on the Interview Wrap-up window. Once the Personal Relationships window has been reviewed to ensure that the relationships are correctly reflected on BEACON, this should be noted on the report by writing: "Relationship window shows accurate information as of xx/xx/2006 (date corrected)."

MIS Responsibilities
Effective with Increment 2.1.19, MIS will un-check the OP indicator for any person with an Other Parent check-box checked who does **not** meet the definition of other parent (that is, parent of a child in common with the grantee and relationship of "spouse", "unrelated" or "other relationship" to the grantee). This group includes anyone on the report whose relationship does not meet the definition of other parent.

This group includes:

- dependent children under age 17;

- parents of teen parents; and

- stepparents.

The following will be added by MIS to the Narratives tab on BEACON: "AP did not meet Other Parent definition. OP indicator removed."

A one-time data-fix will be run *after* the OP clean-up to close ineligible APs 19 and older who do not have their OP indicator checked. The following will be added by MIS to the Narratives tab on BEACON: "Ineligible AP > 18 closed."

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