



**Commonwealth of Massachusetts**  
*Executive Office of Health and Human Services*  
**Department of Transitional Assistance**  
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**Field Operations Memo 2007-58**  
**October 29, 2007**

**To:** Transitional Assistance Office Staff

**From:**  John Augeri, Assistant Commissioner for Field Operations

**Re:** EAEDC: Retroactive Payments Due to Rest Homes Per Diem Rate Increases and the Personal Needs Allowance (PNA) Increase

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**Background**

Effective October 1, 2007, BEACON increased the Personal Needs Allowance (PNA) for EAEDC clients in Living Arrangements C and E from \$60.00 to \$72.80 monthly. This increase was retroactive to July 1, 2007 or to the benefit effective date, if after July 1, 2007. (See Field Operations Memo 2007-53)

Prior to the PNA increase, public per diem rates for Living Arrangement E rest home cases were increased to retroactively affect March 2007 benefits. For some cases, the increase was not wrapped-up in BEACON, even though the Resource Coordinator updated the new per diem rates effective March 1, 2007 in the Residential Facility window. As a result, these cases did not receive the correct per diem rate in the benefit calculation for March through June.

Additionally, the clients were eligible for a per diem **special adjustment rate** benefit for January 1, 2007 through February 28, 2007 as stated in Field Operations Memo 2007-28.

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**TAOs Affected  
by Memo**

This memo only affects cases in the Holyoke, Hyannis, Greenfield, Malden, North Shore, Taunton and Worcester TAOs. A list of cases will be sent electronically with this memo.

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**Purpose of  
Memo**

This memo tells AU Managers to:

- review the cases on the list for possible retroactive benefits owed from January 1, 2007 through February 28, 2007 using the per diem **special adjustment rate**;
- issue the per diem rate increase benefits from March 1, 2007 through June 30, 2007; and  
**Note:** As a result of the October 1, 2007 PNA calculation, BEACON used the increased per diem rate effective March 1, 2007 to calculate the correct monthly benefit as of July 1, 2007.
- issue the amount on the list in the “Retro” column, if it has not already been issued. Since BEACON can only issue amounts six cyclical periods or less, the “Retro” amount represents the portion of the PNA retroactive amount owed to the client.

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**AU Manager’s  
Responsibilities**

- Determine if the per diem **special adjustment rate** benefit was issued. If it was not issued, follow the instructions on page 6 of Field Operations Memo 2007-28 to calculate the benefit. To locate the **special adjustment rate** for the calculation go to the Resource window Resource Comments section, or, in the Resource window Residential Facility tab click on the Public Per Diem Rate popup button. Issue the benefit as a Related Benefit.
- Calculate the per diem increase amount owed to the client for March 1, 2007 through June 30, 2007.

Step 1: Determine the **retroactive** amount for *March 2007*:

- To determine what the client’s benefit should have been for March 2007:
    1. Locate the Rest Home 3/1/2007 per diem rate on the list in the “Rate” column;
    2. Multiply that rate times 7 days;
    3. Multiply the result times 4.333 weeks;
    4. Add \$60.00 Personal Needs Allowance (PNA);
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**AU Manager's  
Actions**

5. Subtract the client's income received in March 2007:
  - ◆ Go to the Results Tab;
  - ◆ Highlight and select the Benefit Effective for March 2007;
  - ◆ Click on the Financial Tab; and
  - ◆ Click on the Gross Income caret to obtain client's total Gross Income.
  
- Determine the client's actual benefit for March 2007:
  1. Go to the Benefit History Tab;
  2. Scroll to the March Cyclical benefits; and
  3. Add the two cyclical benefit amounts.
  
- Subtract the client's actual March 2007 benefit from the **retroactive** amount. The result is the retroactive payment for March 2007.

Step 2: Determine the **retroactive** amount for *April 2007* using the same procedures listed above for March, 2007.

Step 3: Determine the **retroactive** amount for *May 2007* using the same procedures listed above for March 2007.

Step 4: Determine the **retroactive** amount for *June 2007* using the same procedures listed above for March 2007.

Step 5: Add the **retroactive** amount results from Steps 1, 2, 3 and 4. The result is the **total retroactive** amount due to the client for March 1, 2007 through June 30, 2007. Issue the amount as a Related Benefit.

- Locate the amount on the list in the "Retro" column and issue that amount as a Related Benefit, if it has not already been issued. If the column is blank, no Related Benefit issuance is necessary.

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**Questions**

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

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