Field Operations Memo 2010-41
August 25, 2010

To:	**Transitional Assistance Office Staff**
From:	**John Augeri, Assistant Commissioner for Field Operations**
Re:	**BEACON 3.0 Implementation**

Overview

BEACON 3.0 is scheduled to be redeployed on August 30, 2010. All BEACON 2.0 data will be converted to BEACON 3.0 over the weekend of August 27, 2010. Statewide training for all BEACON 3.0 users was conducted in April, May and June. To enhance training, BEACON 3.0 Production has been available between the hours of 7:00 a.m. to 9:00 a.m. and 3:00 p.m. to 5:00 p.m. daily, for all staff to complete practice scenarios.

On Wednesday, August 18, 2010, a statewide stress test was conducted of BEACON 3.0. All users were asked to close out of BEACON 2.0 and log into BEACON 3.0. Field staff was instructed to complete application, recertification and case maintenance activities. Central Office staff was instructed to complete activities associated with their job functions.

Purpose

The purpose of this memo is to ensure that all staff are fully informed of any pertinent information they will require prior to conversion, and to re-introduce the *Conversion Tracking Form* (Attachment A) and the *DTA has a new computer system* flier (Attachment B). The flier has been updated with the appropriate date changes

Pre-Conversion   To ensure a successful deployment, TAO Managers must make certain that staff complete all BEACON 3.0 practice exercises received from the Training Unit by August 26, 2010. Staff should also review the BEACON 3.0 flashes which have been developed by the Training Unit. TAO coverage should be provided to allow staff enough time to complete these exercises.

On Friday, August 27, 2010 case managers will be required to take paper applications because BEACON 2.0 will not be available. TAO staff should be prepared to conduct business without BEACON 2.0 access. All work completed on Friday, August 27, 2010 must be data entered into BEACON 3.0 on Monday August 30, 2010 for processing.

Posters have been provided for display in the waiting rooms. Attached to this memo is a copy of the flier informing clients about the impact on service on Friday, August 27, 2010. Schraffts has sent a supply of the flier to each TAO. In addition, the flier is now available in the Online Forms folder of Policy Online. Copies should be made at each office to be shared with clients until they arrive. Case managers should provide each visiting client with a flier so that they will understand the reason why paper applications are being taken and why certain requests will be unable to be completed on August 27, 2010.

Note: The EBT card issuance system will also be unavailable on Friday, August 27, 2010. Emergency Cards must only be provided to an active client who is unable to access the benefit over the conversion weekend.

The Conversion Tracking Form has been developed by Central Office to be used by case managers to note all case actions taken on August 27, 2010. Case managers must retain this form until BEACON 3.0 is available. On August 30, 2010, case managers must input case actions listed on *The Conversion Tracking Form* into BEACON 3.0, as appropriate.

Passwords   All BEACON 3.0 Production passwords have been set to each user's Employee ID number. When logging into BEACON 3.0 Production for the first time after August 24, 2010, users must enter their User ID (all lower case) as user name and their Employee ID as Password.

The user will be prompted to reset the password after logging in. Each new password requires a minimum of 8 characters, at least one of which must include:
- an upper case letter;
- a lower case letter;
- a number; and
- a special character (!, @. #, $, %)

Passwords (continued)

Each new password will be valid for 60 days. This new password will be the user's password when BEACON 3.0 goes live. If the Employee ID does not work, or the user forgets the new password, call EOHHS Customer Service directly at 617-348-5290 to request a password reset.

Note: All employees hired since June 28, 2010, may have difficulty logging into BEACON 3.0 Production for the first time and may require the assistance of their TAO director.

Remember: Only the Help Desk Liaisons are allowed to call in other types of application issues.

BEACON 3.0

DTA staff should attempt to resolve any BEACON 3.0 issues with the assistance of their supervisors, User Acceptance Testing (UAT) volunteers, managers, and Systems Help Desk Liaisons before calls are made to the Systems Help Desk. Only if the issues cannot be resolved by the aforementioned staff, should the issue(s) be escalated to the Systems Help Desk.

Beginning August 30, 2010, and continuing each morning for as long as necessary there will be a daily 9:00 a.m. conference call for TAO and Central Office managers. The purpose of these calls is to raise and address any BEACON 3.0 issues that are being encountered by staff.

Processing Applications/ Reapplications

On August 27, 2010, when taking (re) applications, case managers must do the following.

- Inform the applicant that the system for taking applications is unavailable. Until the information is entered on BEACON 3.0 on or after August 30, 2010 no benefits will be issued.

- Complete the paper BEACON Request for Assistance (RFA-1) for **all** applicants requesting Cash or SNAP benefits. This will establish the application date.

- If an applicant qualifies for expedited SNAP benefits, schedule an appointment to complete the application within seven days of the applicant submitting an adequate application. This will meet expedited processing timeframes.

Processing Applications/ Reapplications (continued)

- If an applicant requests an Immediate Needs benefit, a paper BEACON application (TABA-1) must be completed. If the person appears cash eligible, a manual SSPS invoice must be issued in accordance with instructions found later in this memo. For Immediate Needs eligibility rules see:106 CMR 702.125 (F).

- If an applicant does not qualify for expedited SNAP benefits or does not request Immediate Needs, schedule an appointment no later than September 3, 2010 to complete the application.

- Annotate all (re) applications on the *Conversion Tracking Form* (Attachment A), include an annotation for any application which qualifies for expedited SNAP benefits. These applicants **must** be scheduled for an appointment within seven days of the date of application to ensure timely expedited processing.

Immediate Needs On August 27, 2010, use the cash calculation worksheet located in the S-Drive in the folder named "calcs for s drive" to determine income eligibility for the requested program. For rules governing financial eligibility, see: 106 CMR 204.200 through 290 for TAFDC, 106 CMR 321.200 through 321.290 for EAEDC and 106 CMR 363.200 through 363.230 for SNAP. For rules governing counting assets, see: 106 CMR 204.100 through 204.140 for TAFDC, 106 CMR 321.100 through 321.140 for EAEDC, and 106 CMR 363.100 through 363.150 for SNAP.

If an applicant for cash benefits requests an Immediate Needs benefit, the case manager must:

- inform the applicant that the system for issuing any benefits for immediate needs is unavailable and will be processed on Monday, August 30, 2010;

- complete an SSPS invoice (as FMCS will be available) to authorize the Immediate Needs benefit; and
  - if the case was established on BEACON prior to August 27, 2010 have data-entry staff enter the completed SSPS invoice to obtain a control number; or
  - if the case was not established on BEACON prior to August 27, 2010, data-entry staff will enter, in the Control Number box, the following: "SD TAO number", (e.g., SD 410).
    Reminder: A control number is required on an SSPS invoice before a vendor can be paid.

Immediate Needs (continued)

- annotate any Immediate Needs benefits issued, on the *Conversion Tracking Form.*

Example: Samantha Smith applies for TAFDC and SNAP on August 27, 2010, but is ineligible for expedited SNAP benefits. Samantha states she needs food in her house. The case manager must complete a TABA-1. Samantha appears to be otherwise eligible for TAFDC. As Samantha requested food the case manager must issue an SSPS invoice for food. Annotate this action on the *Conversion Tracking Form.*

Day 7 Expedited SNAP Benefits or Day 30 Initial SNAP Benefits

Since BEACON 2.0 will be unavailable on August 27, 2010, pending SNAP applications for expedited and regular benefits are at risk of being out of *Tompkins* compliance. If day 7 falls on August 27, 2010, case managers must process the benefit no later than August 26, 2010. If day 30 falls on August 27, 2010, case managers must approve the application no later August 26, 2010. If day 30 falls on August 27, 2010, the application cannot be denied until Monday, August 30, 2010. Under no circumstances can the application be denied on August 27, 2010, as the denial will constitute a Negative Error.

Reinstating Cases Within 30 Days of Closing

On August 27, 2010, for any former TAFDC or EAEDC case closed within 30 days prior to that date but will be reinstated, the case manager must:

- have the former client sign an RFA-1 to record the reinstatement;

- inform the former client that the system is unavailable and that the information will be entered onto BEACON on or after August 30, 2010;

- inform the former client that all benefits for which he or she is eligible will be received retroactive to the reinstatement date once entered;

- annotate any reinstatements to be processed on the *Conversion Tracking Form*; and

- ensure that all former clients requesting a reinstatement receive the *DTA has a new computer system* flier.

Reinstating Cases Within 30 Days of Closing (continued)

On August 27, 2010, if any former client requests that his/her case be reopened, and the client was removed or the case was closed within 30 days of August 27, 2010 for failure to provide verifications, the case manager must:

- determine what verification(s) are needed to reinstate the case; and

- make a photocopy of all verification(s) provided.

Former clients/cases closed within 30 days prior to August 27, 2010 for failure to provide verifications, if eligible, will be reopened retroactive to the day after the closing date, once BEACON 3.0 is in production. For rules governing eligibility, see: 106 CMR 702.160 through 702.240

Former clients/cases closed within the 30 days prior to August 27, 2010 for a reason other than failure to provide verifications, if eligible, would be reopened effective the day they come into the TAO, once BEACON 3.0 is in production. For rules governing eligibility, see: 106 CMR through 702.170 through 702.240.

Ongoing Case Maintenance

On August 27, 2010, if any client requests case maintenance (e.g., child care authorizations, ESP referrals, address change), the case manager must:

- inform the client that the system for processing these activities is unavailable and that the information will be entered onto BEACON on or after August 30, 2010;

- make a photocopy of all verification(s) provided by the client;

- annotate any actions on the *Conversion Tracking Form*; and

- ensure that all applicants and clients receive the *DTA has a new computer system* flier.

Issuing Temporary MassHealth Cards

As FMCS will be available, NewMMIS will be available to issue temporary and or replacement MassHealth cards. For procedures to issue temporary cards or replacement MassHealth cards see Field Operations Memo 2008-51.

Conversion and the Division of Hearings

On August 27, 2010, if an applicant or client files an appeal for an action taken before conversion, the case manager must:

- give the applicant/client a stand-alone appeal form (DOH-10, Rev. 12/96), if requested;

- inform the applicant/client that the Division of Hearings will track the appeal request; and

- annotate this on the *Conversion Tracking Form.*

Questions

If you have any questions, please have your designee call the Systems Help Desk at (617) 348-5290

Case Name	Case SSN	Action Taken/ Benefit Issued	Date of Action/ Benefit Issued

DTA has a new computer system!

The Department of Transitional Assistance (DTA) has a new computer system called BEACON 3.0.

We will be converting to our new system on Friday, August 27, 2010.

As a result, all computer systems will not be available on **Friday August 27, 2010**.

No EBT Cards will be issued or replaced on **Friday, August 27, 2010**.

All systems will be up and running on Monday, August 30, 2010.

We apologize for any inconvenience.
Thank you for your patience.