



Commonwealth of Massachusetts
Executive Office of Health and Human Services
Department of Transitional Assistance
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Field Operations Memo 2006-37
September 15, 2006

To: Transitional Assistance Office Staff

From:  Cescia Derderian, Assistant Commissioner for Field Operations

Re: TAFDC - Automatic Closings for TAFDC/SSI Recipients

Overview

Effective with BEACON Increment 2.1.20, TAFDC Assessed Persons (APs) who are approved for and begin receiving SSI will be automatically closed. This will prevent double payments (TAFDC and SSI State Supplement) for both adults and children. Additionally, BEACON will automatically adjust the AP's:

- work program requirements;
- mandatory/responsibility reasons; and
- previous TAFDC work program sanctions (by removing them).

BEACON will also adjust the AU Exemption Status.

Reminder: EAEDC Assistance Units (AUs) continue to be automatically closed upon receipt of SSI benefits for single-person AUs or reduced/terminated for caretaker family AUs.

Purpose of Memo

This Field Operations Memo informs TAO Staff about:

- how these changes will impact TAFDC APs and AUs; and
- a one-time data-fix performed by MIS.

**Automatic
Closings
Procedures**

Once daily, SDX updates financial and disability information for any AP known to BEACON and sets a calculation request if the AU is active. Currently, the AU Manager must check his or her “Clients with RSDI and/or SSI” view to determine which APs are receiving RSDI/SSI and begin the process for terminating the AP receiving SSI.

Effective with BEACON Increment 2.1.20, BEACON will begin to close these APs automatically.

**AU Exemption
Status**

BEACON will do the following for the AU Exemption Status:

- ✓ For one-parent AUs, BEACON sets the AU exemption status to “Exempt” when the parent is receiving SSI benefits.
- ✓ For two-parent AUs, BEACON sets the AU exemption status by looking at *both* parents’ work program requirement (the exceptions to this are the “Caring for the Disabled” and “Youngest Child < 2” exemptions which must be reviewed by the AU Manager). An Actuate report listing these two-parent AUs needing review will be available the first week in October.

**AU Composition
Results AP Status**

For each AP being closed for receipt of SSI, BEACON will do the following:

On the AU Composition Results window, the AP Status will be set to “Ineligible” (once the result is released from Interview Wrap-up) for the following APs:

- grantees or non-legally liable grantees;
Reminder: Most non-legally liable grantees are already set to “Ineligible.”
- other parents; and
- dependents under age 19.

The AP Status will be set to “Closed” for the following APs:

- dependents over age 18 will be closed with the closing reason of “Depd Age 18 or 19 yrs old and does not meet age/school requirements.”

**Work Program
Required Status
Reason**

On the Work Requirements window, the AP work program “Required” radio button will be set to “No” and the AP “Work Program Required Status Reason” will change to:

- “SSI Grantee/OP” for grantees or other parents; and
Note: “SSI Grantee/OP” replaces “Inelig Grnt/Other Prnt on SSI.”
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**Automatic
Closings
Procedures
(continued) Work
Program Required
Status Reason**

- “Ineligible Grantee” for a non-legally liable grantee.
Note: An AP is designated as “non-legally liable” when all the active or ineligible dependents have a personal relationship other than “child” to the grantee.

The FS Work Program Requirement and the FS ET reasons will be set to “Physically or Mentally Unfit” since the AP is not work required for either the Food Stamp Work Program or FS ET program.

Note: Even though a teen parent will become “exempt” due to receipt of SSI, he or she is still subject to the school attendance requirement.

**AU Mandatory/
Responsible
Status Change**

On the AU Mandatory/Responsible window, the AP status will change to the following:

- the “Applying” radio button will be set to “No”;
- the “Mandatory Inclusion” radio button will be set to “Yes” for:
 - ✓ legally liable grantee;
 - ✓ other parent; and
 - ✓ dependent child under age 18.
- the “Mandatory Inclusion” radio button will be set to ‘No’ for:
 - ✓ non-legally liable grantees.

**AU Mandatory/
Responsible
Responsibility
Reason Change**

On the AU Mandatory/Responsible window, the Responsibility Reason will be set to:

- “SSI Recipient” for legally liable grantees or other parents;
- “None” for a non-legally liable grantee; and
Note: Most non-legally liable grantees will already be set to “None.”
- “Dependent Child – SSI” for a dependent under age 18.

**AU Mandatory/
Responsible
Mandatory
Reason Change**

On the AU Mandatory/Responsible window, the Mandatory Reason will be set to:

- “SSI Grantee/Other Parent” for grantees or other parents;
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**Automatic
Closings
Procedures
(continued) AU
Mandatory/
Responsible
Mandatory
Reason Change**

- “None” for a non-legally liable grantee; and
Note: Most non-legally liable grantees will already be set to “None.”
- “Used for Eligibility Determination” for a dependent under age 18.

**Narratives Tab
Updates**

A narrative will be added when the automated process updates the SSI recipient.

- If the SSI recipient is a child under age 18, the following will be added to the Narratives Tab on BEACON: “Dependent child set to be removed from the AU due to receipt of SSI. AP status and mandatory/responsibility codes updated and benefits will be recalculated.”
 - If the SSI recipient is a child over age 18, the following will be added to the Narratives Tab on BEACON: “Dependent child set to be removed from AU and benefits will be recalculated due to receipt of SSI benefits.”
 - If the SSI recipient is a grantee or other parent, the following will be added to the Narratives Tab on BEACON: “The grantee or other parent set to be removed from the AU for receipt of SSI benefits. AP Status, mandatory/responsibility, work program requirement, Work Program sanctions and AU Exemption Status were reviewed and will be updated if necessary and benefits recalculated.”
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**Two Parent AU
Report**

Beginning the first week in October, an Actuate report will be created by MIS listing two parent AUs where one parent is an SSI recipient and the other parent has a work program exemption reason of “Caring for the Disabled” or “Youngest Child < 2.” The report “TAFDC/SSI Recipients Requiring Review” will be located in the “Matches/Detail Folder.”

*AU Manager
Responsibilities*

For each of the AUs listed on the report, the AU Manager must schedule an appointment with the parents to verify (by a doctor’s statement or the *Verification of Disability TAFDC-4, Rev. 9/2004*) if the parent in receipt of SSI can care for the youngest child or for the person in the household who is disabled.

- If the parent in receipt of SSI cannot care for the youngest child or for the person in the household who is disabled:
 - ✓ the other parent would keep his or her exemption; and
 - ✓ change the AU to “Exempt” on the AU Exemption tab of the Work Requirements window.

- If the parent in receipt of SSI **can** care for the youngest child or for the person in the household who is disabled:
 - ✓ the other parent in the AU is work program required (unless he or she has another exemption from the work program);
 - ✓ change that parent’s work program requirement reason to the appropriate reason; and
 - ✓ *if that parent is in the first 60-day of the work search period*, give the parent the TAFDC Work Program Requirement Brochure (*WPIB, Rev. 9/2004*) and inform the parent that he or she has 60 days to meet the work program requirement, entering the start and end dates of the work search period onto the brochure; *or*
 - ✓ *if that parent has used the 60-day work search period*, tell the parent that he or she must start meeting the work program requirement within 10 days and make a referral to an activity meeting the work program requirement following established procedures.

As the AUs are updated following instructions above, the AU name will be removed from the “TAFDC/SSI Recipients Requiring Review” report.

As SDX updates the information daily, the AU names will appear on the report for updating.

**Accessing
Actuate**

To access Actuate:

- Double click on the “Actuate Report Viewer” icon on BEACON;
 - Type in his or her “WEL ID” in *lower case letters* in both the “Name” and “Password” fields, click on “Log On” or press “Enter” on the PC keypad; and
 - Click on “BEACON2”;
 - Click on the “Matches/Detail Folder”; and
 - Click on “TAFDC/SSI Recipients Requiring Review.”
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MIS Data Fix

Effective with Increment 2.1.20, MIS will do the following:

- close any current active SSI recipient;
 - change all APs with a “Work Program Required Status Reason” of “Inelig Grnt/Other Prnt on SSI” to “SSI Grantee/OP”;
 - remove any work program sanction that took place after the SSI application date (the sanction will be removed with the reason “Admin/System Error”);
 - ensure every SSI recipient has the correct AU Mandatory/Responsible and work program requirement reasons; and
 - run an informational report (which will be e-mailed to TAOs after Increment 2.1.20) listing APs who were updated by MIS and how they were updated.
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Questions

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