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*Executive Office of Health and Human Services*  
**Department of Transitional Assistance**  
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**Field Operations Memo 2008-7**  
**February 13, 2008**

**To:** Transitional Assistance Office Staff

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

**Re:** EAEDC: Rest Homes Per Diem Rate Changes Effective January 1, 2008

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**Overview**

The Division of Health Care Finance and Policy (DHCFP) issued new public per diem rates for Massachusetts licensed rest homes, effective January 1, 2008. Additionally, DHCFP approved a special adjustment rate as additional funding for rest homes for December 1, 2007 through December 31, 2007.

As with every per diem rate change, AU Managers must recalculate the EAEDC benefit individually for each client living in the rest home, using the rest home's new rate.

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**Purpose of Memo**

This memo:

- identifies EAEDC clients whose rest home's per diem rate has changed and the corresponding rate changes that need to be made in BEACON;
  - provides instructions on how to change per diem rates in BEACON and recalculate benefits as a result of the rate change; and
  - provides instructions on how to manually calculate a special adjustment rate retroactive benefit for December 1, 2007 through December 31, 2007.
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**Rest Home  
Cases and Rates  
List**

A list of EAEDC clients in rest homes is being e-mailed to TAO Directors and Assistant Directors with this memo. TAO Directors and Assistant Directors should save the list as a working document to be distributed to the TAO staff member with the Security role of Resource Coordinator.

The list is sorted alphabetically by TAO and includes the following information:

- TAO;
- AU Manager;
- SSN;
- Grantee;
- Residential Facility (Rest Home);
- Street Address;
- City;
- Current Rate in BEACON;
- Rate 12/1/2007 – 12/31/2007 (the special adjustment rate);
- Rate Effective 1/1/2008; and
- Change (The difference between Rate Effective 1/1/2008 and Current Rate in BEACON).

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**TAOs with No  
Clients On the  
List**

The following TAOs have no clients on the list: Boston Family Housing, Centralized TAFDC, Malden Centralized SSI, and North Adams.

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**Changing Per  
Diem Rates in  
BEACON:  
Resource  
Coordinator's  
Responsibilities**

When rest homes are given new public per diem rates from DHCFP, the Residential Facility Tab must be updated with the new rates by the Resource Coordinator.

To provide rest home per diem rate historical records, the “Rate 12/1/2007 – 12/31/2007” special adjustment rate must be added to the Residential Facility Tab before adding the “Rate Effective 1/1/2008.” This must also be done to avoid overpayment or underpayment of EAEDC benefits because BEACON will use the latest per diem rate entered (**must be the “Rate Effective 1/1/2008”**) on the Residential Facility Tab when calculating current EAEDC benefits.

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**Changing Per  
Diem Rates in  
BEACON:  
Resource  
Coordinator's  
Responsibilities  
(continued)**

**Note:** For some rest homes on the list, the “Rate Effective 1/1/2008” is a greater rate than the “Rate 12/1/2007 – 12/31/2007” special adjustment rate. According to DHCFP, those rates are based on a special formula applied to those rest homes and the rates are correct.

To add the “Rate 12/1/2007 – 12/31/2007” special adjustment rate and then the “Rate Effective 1/1/2008” the Resource Coordinator must go to the BEACON Resource Search window and:

- select “Housing” from the General Service dropdown box;
  - select the TAO from the TAO field dropdown box and click on “Find”;
  - locate each rest home by Resource Name from the list and click “Open” for each Resource;
  - check the Resource End Date field to see if the date will expire prior to 06/30/2008. If the End date will expire before this date, change the End Date to 12/31/2010;
  - go to the Residential Facility Tab;
  - click on the Public Per Diem Rate popup button;
  - add the “Rate 12/1/2007-12/31/2007” special adjustment rate amount from the list to the to the “Rate” field, effective 12/1/2007;
  - enter 12/1/2007 in the “From Date” field;
  - click on “Save” then Close;
  - in the “Comments” field on the Resource Tab add a comment indicating the “Rate 12/1/2007-12/31/2007,” the special adjustment rate amount and its effective date, 12/1/2007, as a record for the rest home’s per diem history;
  - click on “Validate” to validate the Resource Address;
  - click on “Save” and a note will appear which states “The end date is greater than the current fiscal year. Do you want to continue?” Click on “Yes”;
  - click on “Save”;
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**Changing Per Diem Rates in BEACON: Resource Coordinator's Responsibilities (continued)**

- return to the Residential Facility Tab;
- click on the Public Per Diem popup button;
- add the current per diem record "Rate Effective 1/1/2008" amount from the list to the "Rate" field;
- enter 1/1/2008 in the "From Date" field;
- click on "Save";
- click on "Validate" to validate the Resource Address;
- click on "Save" and Close;
- note the "Rate Effective 1/1/2008" in the Resource Tab Comments field;
- click "Save" and a note will appear which states "The end date is greater than the current fiscal year. Do you want to continue?" Click on "Yes"; and
- click on "Save" and Close.

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**AU Manager's Responsibilities**

Once the current "Rate Effective 1/1/2008" is added for each rest home, the Resource Coordinator must give a copy to the appropriate AU Manager. The AU Manager must recalculate the current EAEDC benefit for each client on the list, using the "Rate Effective 1/1/2008" and manually calculate retroactive benefits for clients, using the "Rate 12/1/2007-12/31/2007" special adjustment rates from the list.

To recalculate the current EAEDC benefit in BEACON:

- go to Interview Wrap-up;
  - click on Selection, select EBC Results;
  - calculate the EBC Request and Close;
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**AU Manager's  
Responsibilities  
(continued)**

- highlight and select the benefit result from the calculation;
- enter 1/1/2008 in the Benefit Effective Date field;
- click on Update and Close; and
- authorize the EBC Request following established procedures.

BEACON will generate an EBC "Cash Change" notice to the client. The notice will appear in Document History.

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**AU Manager's  
Responsibilities:  
Retroactive  
Benefit Manual  
Calculation**

In order to reflect the rate increases for rest homes approved by DHCFP retroactive to December 1, 2007, AU Managers must manually calculate retroactive EAEDC benefits for 12/1/2007 through 12/31/2007 for clients and issue a Supplemental Payment to them.

To determine the retroactive benefit amount for December, 2007:

Step 1: Determine what the client's benefit should have been for December, 2007:

1. Locate the rest home "Rate 12/1/2007-12/31/2007" special adjustment rate from the list;
2. Multiply that rate times 7 days;
3. Multiply the result times 4.333 weeks;
4. Add \$72.80 Personal Needs Allowance (PNA);
5. Subtract the client's income received in December 2007:
  - ◆ go to the Results Tab;
  - ◆ highlight and select the Benefit Effective for December, 2007;
  - ◆ click on the Financial Tab; and
  - ◆ click on the Gross Income caret to obtain the client's total Gross Income.

The result is the benefit the client should have received in December.

Step 2: Determine the client's actual benefit for December, 2007:

1. Go to the Benefit History Tab;
  2. Scroll to the December Cyclical benefits; and
  3. Add the two cyclical benefit amounts.
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**AU Manager's  
Responsibilities:  
Retroactive  
Benefit Manual  
Calculation  
(continued)**

Step 3: Subtract the client's actual December, 2007 benefit (Step 2) from the benefit the client should have received in December (Step 1). The result is the Supplemental Payment for December, 2007.

Step 4: Issue the Supplemental Payment as a Related Benefit.

Once the Related Benefit Supplemental Payment is authorized by the TAO Director/designee, BEACON will generate a Related Benefit Notice to the client. The notice will appear in Document History.

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**Completion of  
the Per Diem  
Rate Changes**

TAOs must complete the per diem rate changes, recalculate the current EAEDC benefit and issue a retroactive supplemental payment for clients on the list **no later than February 26, 2008**.

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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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