



**Commonwealth of Massachusetts**  
*Executive Office of Health and Human Services*  
**Department of Transitional Assistance**  
600 Washington Street • Boston MA 02111

DEVAL L. PATRICK  
Governor

JUDYANN BIGBY, M.D.  
Secretary

TIMOTHY P. MURRAY  
Lieutenant Governor

JULIA E. KEHOE  
Commissioner

**Field Operations Memo 2008-27**  
**May 30, 2008**

**To:** Transitional Assistance Office Staff  
**From:** John Augeri, Assistant Commissioner for Field Operations  
**Re:** Maximized Categorical Eligibility for NPA Food Stamp Households

**Background**

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The Department is further expanding categorical eligibility rules for Non-Public Assistance food stamp (NPA/FS) households. Effective June 9, 2008 there will no longer be an asset test for most NPA/FS households.

Clients will be relieved of the burden of providing asset information and verifications. TAO staff will no longer have to request and review asset verifications or explore asset-related matches. This change will have a positive impact on many vulnerable Massachusetts households, particularly households with elder and disabled members.

The State Letter transmitting the Maximized Categorical Eligibility policy is currently being finalized.

**Overview**

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This memo will:

- Review categorical eligibility groups and rules.
    - ♦ Existing categorically eligible groups will be discussed; and
    - ♦ new categorically eligible groups will be identified.
  - Identify households still subject to asset limits.
  - Discuss screening and processing of households still subject to asset limits.
  - Provide instructions for processing the new categorically eligible groups, including:
    - ♦ entering asset information on new applications, reapplications and recertifications; and
    - ♦ handling asset-related match information.
  - Describe changes to Department brochures and forms.
  - Discuss the impact of this change on Virtual Gateway applications.
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**WHO IS CATEGORICALLY ELIGIBLE FOR FOOD STAMP BENEFITS?**

**Existing  
Categorically  
Eligible Groups**

**EAEDC FS Households**

Any FS household in which **all** members are receiving or are authorized to receive cash assistance under the EAEDC program are subject to the income and asset rules of the EAEDC program.

**SSI FS Households**

Any FS household in which **all** members are receiving or are authorized to receive cash assistance under the SSI program are subject to the income and asset rules of the SSI program.

**TAFDC FS Households**

Any FS household in which **all** members are receiving or are authorized to receive cash assistance under the TAFDC program are subject to the income and asset rules of the TAFDC Program.

**FS-Only TANF Services Households**

An NPA FS household which consists of:

- a pregnant woman living alone; or
- a child(ren) under age 19 living with a parent or caretaker relative or an adult caretaker exercising FS parental control.

is subject to the FS gross monthly income test at 106 CMR 364.976. There is no asset test for these households. Receipt of the *Help for Those in Need: A Resources Brochure* (Attachment A) confers a TANF Program service.

**Note:** The categorical eligibility determination for the FS households described above is fully automated in BEACON.

**FS - Only TANF Services Households**

**New  
Categorically  
Eligible Groups**

An NPA FS household which consists of adults between the ages of 19 and 59 is subject to the FS gross and net income tests at 106 CMR 364.950 and 106 CMR 364.970 and is no longer subject to an asset test. Receipt of the *Help for Those in Need: A Resources Brochure* confers a TANF Program service.

**FS - Only TANF Services Elder Households**

An NPA FS household which consists of all non SSI elder (age 60 or over) members is subject to the FS gross and net income tests at 106 CMR 364.976 and 106 CMR 364.970 and is no longer subject to an asset test. Receipt of the *Help for Those in Need: A Resources Brochure* confers a TANF Program service.

**Important:** At this time, the new categorically eligible groups will be denied if income exceeds the net standard. Once changes are made to BEACON these cases will be approved at zero benefits or issued minimum FS benefits.

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**WHO IS NOT CATEGORICALLY ELIGIBLE FOR FOOD STAMP BENEFITS?**

**Households  
Not Categorically  
Eligible**

Certain households cannot be considered categorically eligible. A household with a member currently disqualified due to:

- **an Intentional Program Violation at 106 CMR 367.800; or**
- **Failure to Comply with FS Work Program requirements at 106 CMR 362.320; or**
- **Failure to Comply with TAFDC Monthly Reporting requirements at 106 CMR 366.110(D)** is not categorically eligible.

An elder or disabled household which has **income in excess of the 200% poverty level** is not categorically eligible. In these situations, the AU Manager must request asset information and appropriate verifications to determine eligibility.

When attempting to wrap up an application/recertification, BEACON currently alerts AU Managers that a member of an existing categorical eligibility group is disqualified. The edit reads, *Asset data must be completed and selected before the request can be authorized. Please return to the Assets Q&A Navigator window.* The AU Manager must then contact the client to request asset information to process the application or recertification.

**Screening for  
Households  
Not Categorically  
Eligible**

To ensure that disqualified households are identified earlier in the process, AU Managers should screen all FS households at application or recertification to determine if any member of the household is currently disqualified due to an Intentional Program Violation, Failure to Comply with FS Work Requirement (FS/E&T or FS/WP) or Failure to Meet TAFDC Monthly Reporting Requirements. The AU Manager must:

- go to the AU Comp Results window/Sanctions tab to see if there is a disqualified household member; and
- if yes, answer the Asset Q&A Navigator questions and request asset verifications, as appropriate, to determine eligibility.

**Note:** A household that failed to comply with TAFDC monthly reporting requirements may be considered categorically eligible once TAFDC or NPA/FS income reporting requirements are met.

If during the certification period the AU Manager is alerted of a disqualification penalty, the AU Manager must request asset information/verification in accordance with reporting rules for the FS household.

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**Screening for Households Not Categorically Eligible (Continued)**

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To ensure that elder or disabled households are identified early in the process, AU Managers should screen all FS elder or disabled households at application or recertification to determine if household's gross income exceeds the 200% poverty level. If yes, answer the Asset Q&A Navigator questions and request asset verifications, as appropriate, to determine eligibility.

Timeframes for requesting asset information from ongoing households are as follows:

- For TBA or USR households, asset information should be requested at the next recertification.
- For 10 day reporting households, the AU Manager must immediately request asset information from the household to determine continued eligibility.

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**Entering Asset Information on BEACON**

When entering asset information on TAFDC/FS or EAEDC/FS households, AU Managers must enter the amount of any asset as \$00.00 for FS purposes on the Asset window. This will ensure that the PA/FS household is treated appropriately in the event that the cash case is closed due to assets.

Until BEACON is reprogrammed, the Asset Q&A Navigator will continue to be part of the workflow for the FS-Only *TANF Services Adult Households* and *TANF Services Elder Households*. AU Managers must use the following instructions when processing a household identified after screening as a *FS - Only TANF Services Adult Household* or *TANF Services Elder Household*.

**New Applications:**

For FS-Only *TANF Services Adult Households* and *TANF Services Elder Households* that apply for FS benefits, the AU Manager must:

- check "No" to all the asset questions on the Q&A Navigator; and
- enter *CAT ELIG – No Asset Test* on the BEACON Narratives tab.

**Reapplications and Recertifications:**

For FS-Only *TANF Services Adult Households* and *TANF Services Elder Households* that reapply or recertify for FS benefits:

With no history of assets on BEACON, the AU Manager must:

- check "No" to all the asset questions on the Q&A Navigator; and
- enter *CAT ELIG – No Asset Test* on the BEACON Narratives tab.

With a history of assets on BEACON, the AU Manager must:

- on the Verification tab enter verified YES and enter Other: *Cat Elig AU*
- enter *CAT ELIG – No Asset Test* on the BEACON Narratives tab.

**Important:** BEACON will continue to bypass the Asset Q&A Navigator for existing categorically eligible households.

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**Disposing of  
Asset-Related  
Computer  
Matches**

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For categorically eligible FS households, Centralized Eligibility Operations (CEO) staff will no longer forward paper asset match information to TAO staff. CEO staff will review BEACON to determine whether an asset-related match referral is appropriate. If the AU Manager receives an asset-related match from CEO, the match information must be explored in accordance with current procedures.

Until automated IRS Matches are disabled for the new categorically eligible groups, CEO staff must disposition IRS Asset Match information as follows:

- Cooperated: Yes
- Countable: No
- Effect on AU: No Change

**Revised  
Brochure and  
Forms**

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To confer categorical eligibility to the additional households, the Department was required to revise the TANF funded services brochure. The Family Resource Brochure was expanded and renamed. The *Help for Those in Need: A Resources Brochure* now contains information applicable to households without children and elder households. This brochure will be given to all TAFDC and FS clients. The AU Manager must hand the brochure to all walk-in applicants. Mail-in, fax, Internet, and applicants who drop-off their application forms will be mailed the brochure as part of the Application Information Notice.

The *Food Stamp Application* form has been revised. The asset questions have been removed and changes were made to the instruction page. Language has been added to the Expedited Service section which explains that asset information will be asked but not verified. Language was also added to the verifications section which explains that certain households with disqualified members will be asked to provide asset information and verifications.

The *How to Get Food Stamp Benefits* brochure has been revised. The asset section was changed and the asset limits were removed.

The *SSI Recertification Form* has been revised. The asset questions were removed from this form.

The *Food Stamp Change Report* form has been revised. Asset limit information was removed from the instructions page. The asset questions were eliminated.

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**Impact on  
Virtual Gateway  
FS Applications**

Until the Virtual Gateway FS Application (*Consumer and Provider*) can be updated, the asset questions will continue to appear for the new categorically eligible groups.

**Important:** The Virtual Gateway will continue to bypass the Asset Screens for existing categorically eligible households.

The DTA main page of the Consumer Application will alert individuals that asset information is no longer required. Providers will be notified of this change through an online update issued on the Provider Application. In addition, DTA will forward this information to all Virtual Gateway FS providers trained by FS Outreach staff

If Asset information is received on a Virtual Gateway FS Application, the information must be handled as outlined in the **Entering Asset Information on BEACON** section of this memo.

**Questions**

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

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## Housing

There is a limited amount of public and subsidized housing in Massachusetts. The rent a public housing tenant pays is based on household income and whether utilities are included in the rent. Rental assistance programs provide financial aid in the form of subsidies or vouchers to help low-income persons rent apartments.

For more information about these services, call the Department of Housing and Community Development (DHCD) at 1-617-573-1100. You can also ask DHCD for a pamphlet called, "*How to Obtain Housing Assistance in Massachusetts.*"

You may also apply for RAFT through DHCD. RAFT (Residential Assistance for Families in Transition) is a state-funded homelessness prevention program. RAFT gives short-term financial assistance to low-income families who are homeless or at risk of becoming homeless.

## Homeless Services

To assist homeless families, DTA's Emergency Assistance (EA) Program provides services, including temporary emergency shelter, to increase both family stability and access to permanent housing. The EA Program is for homeless families with children or pregnant women who meet financial eligibility standards.

The Department of Transitional Assistance also provides emergency shelter for individuals without children. Eligibility requirements are set by the shelter and placements are made on a first-come, first-served basis. To apply for EA or to find out more information on homeless services, please contact your local DTA office.

## MassHealth

MassHealth offers a broad range of health care services for low - and moderate-income people in Massachusetts. It pays for part or all of a member's health insurance or pays medical providers for services. When you apply for cash assistance at your local DTA office, your eligibility for MassHealth will be reviewed. For more information on MassHealth, call toll-free 1-800-841-2900 or go to [www.mass.gov/masshealth](http://www.mass.gov/masshealth).

## Elder Services and Nutrition

The Executive Office of Elder Affairs offers information and valuable resources such as housing, home health care, meals and nutrition advice. For more information on the wide variety of programs and services provided, contact the Executive Office of Elder Affairs at 1-617-727-7750 or visit their website at [www.mass.gov/elderservices](http://www.mass.gov/elderservices).

## Refugee and Immigrant Assistance

The Massachusetts Office for Refugees and Immigrants (ORI) provides services and assistance to certain immigrant populations, including refugees, asylees, victims of human trafficking, and other immigrants. To obtain information about services or if you need assistance, call ORI at 617-727-7888 or visit their website at [www.mass.gov/ori](http://www.mass.gov/ori).

## Veterans' Benefits

If you ever served in the United States Armed Forces and were honorably discharged, you are a veteran. In addition to health care, substance abuse and mental health services, burial benefits, educational benefits, and employment assistance, you may be eligible for monetary benefits. Contact the Massachusetts Department of Veterans' Services at 617-210-5480 or visit their website at [www.mass.gov/veterans](http://www.mass.gov/veterans) to locate a state benefits counselor near you.

## Fuel Assistance - Community Action Program (CAP)

Fuel Assistance can help you pay for heating your house or apartment during the winter months. It can pay for fuel, or if heat is included in your rent, it can pay for a part of your rent.

Community Action Program (CAP) offices run the fuel assistance programs and provide help with electric and gas bills, insulation and furnace repairs. Many CAP offices also help with a wide variety of other services, including job training, day care and housing information. To find out which agency covers your city or town, call the "Heatline" at 1-800-632-8175 or visit their website at [www.mass.gov/dhcd/](http://www.mass.gov/dhcd/).

**Utility Discounts** - Most electric companies and gas companies have low-income discount programs. You automatically qualify for the discounts if you receive cash assistance, food stamp benefits, MassHealth, SSI, Fuel Assistance, or if your child is in the School Lunch Program or Head Start. These discounts can save you 25-35 percent on each bill. To apply for the discounts, call your gas and electric companies and ask for an application.

**Telephone Discounts** - Some telephone companies also have low-income discount programs. Call your local telephone company to ask if it has a low-income discount program and how to apply.

This is a TANF-funded brochure.

## Help for Those in Need:



## A Resource Brochure

The Department of Transitional Assistance (DTA) understands that sometimes it's hard to make ends meet. That's why we want you to know that there are many programs that can help you through a tough time.

This brochure provides a list of several places to get the help you might need.

Phone numbers are listed for many of these services. A worker at DTA can help you with cash assistance or a food stamp application.



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Commonwealth of Massachusetts

Believing you can.

[www.mass.gov/dta](http://www.mass.gov/dta)



## Food Stamp Benefits

Food stamp benefits help you buy nutritious food that you need for your family. All food stamp recipients can receive free nutrition information by visiting [www.mypyramid.gov](http://www.mypyramid.gov) or by calling the UMass Extension Nutrition Education Program at 1-800-622-3637. To apply or get information about food stamp benefits, call the Department of Transitional Assistance (DTA) Application Information Unit toll-free at 1-800-249-2007 or 1-866-950-FOOD or go to your local DTA office. You can apply in person, by mail or you can fax in your application. You can also apply online at [www.mass.gov/dta](http://www.mass.gov/dta).

## Women, Infants and Children (WIC)

The Department of Public Health runs the WIC Program. This program provides food vouchers to pregnant and nursing women, new mothers and children under age five. To get more information, call the Department of Public Health WIC Hotline at 1-800-WIC-1007. You may also visit online at [www.mass.gov/wic](http://www.mass.gov/wic).

## Food Banks

Massachusetts' food banks offer emergency assistance by providing food pantries and other food programs with emergency supplies. Food banks will provide you with a list of programs in your area where you can get free emergency food. Call a food bank in your area:

- Eastern Massachusetts: Greater Boston Food Bank 1-617-427-5200
- Central Massachusetts: Worcester County Food Bank 1-508-842-3663
- Western Massachusetts: The Food Bank of Western Massachusetts 1-413-247-9738

To find food resources in your community, you may also call Project Bread's FoodSource Hotline at 1-800-645-8333 (TTY: 1-800-377-1292).

## School Breakfast and School Lunch Program

These programs provide free or reduced price nutritionally balanced meals and snacks to children in participating schools. In Massachusetts, children residing in households that receive food stamp benefits are automatically enrolled in the school lunch and breakfast programs. If you would like to enroll your child in any of these programs, please call the Massachusetts Department of Elementary and Secondary Education at 1-781-338-3000 (TTY:1-800-439-2370) or visit [www.mass.gov/doe](http://www.mass.gov/doe) or [www.doe.mass.edu](http://www.doe.mass.edu). You may also call your child's school.

## Career Centers

If you need help finding a job or would like information about training opportunities, you can go to your local Career Center. Each Career Center has free resources to help you apply for jobs and help you with job search. In addition, Career Center staff will provide you with information about training opportunities, including financial assistance. Career Centers are located in most major cities in Massachusetts. To find the one closest to you, call the Division of Career Services (DCS) at 1-617-626-5300, or visit their website at [www.mass.gov/careercenterservices](http://www.mass.gov/careercenterservices).

## Job Search/Job Readiness Program

The Job Search/Job Readiness Program helps people find work. Activities include identifying and finding solutions to employment barriers, job readiness activities, job search activities and follow-up services to help you get a job. Programs are also available to help you keep your job or get a better job. Call or visit your local DTA office for more information.

## Employment Services Program (ESP)

Employment services are available to address your vocational, educational and training needs. Call or visit your local DTA office for more information.

## Tax Assistance - Earned Income Tax Credit (EITC/EIC)

If you or someone in your family works, you may be eligible for the federal Earned Income Tax Credit (EITC) and the state Earned Income Credit (EIC). Filing taxes and claiming EITC/EIC tax credits could mean you will pay no taxes and still get a refund from the Internal Revenue Service (IRS) or Massachusetts Department of Revenue (DOR). To qualify, you must work, meet certain income and other requirements, and file a tax return, even if you did not earn enough money to be required to file. In Massachusetts, getting the EITC/EIC refunds will not affect your eligibility for MassHealth, SSI, food stamps, low-income housing, or cash assistance. For more information about EITC/EIC or to find out how to get free help with filing your tax return, call the IRS at 1-800-829-1040 (TTY/TDD: 1-800-829-4059) or call DOR at 617-887-MDOR (6367) or toll-free in Massachusetts:1-800-392-6089. To find a free tax preparation site, visit [www.mass.gov/masscashback](http://www.mass.gov/masscashback).

## Unemployment Benefits

If you lost your job or if the number of hours you work has been cut, you may be eligible for unemployment benefits. You may also be eligible for job search and job training benefits. Apply for benefits by phone or at your nearest Unemployment Insurance Walk-In office.

By phone: 1-877-626-6800 from area codes 351, 413, 508, 774, and 978.  
617-626-6800 from any other area code, including 617. TTY/TTD: 1-888-527-1912.

In person: You may visit an Unemployment Insurance Walk-In office. These include all DCS Career Centers plus a few other offices. These are listed at [www.mass.gov/careercentersuiling](http://www.mass.gov/careercentersuiling), or you may call 1-617-626-6560 for the location nearest you.

## Child Care

Safe, affordable child care is your number-one priority if you are working, participating in Job Search/Job Readiness, or attending an approved training or education program. For information about low-cost, quality child-care assistance, call the Department of Early Education and Care (EEC) at 1-617-988-6600 or the Child Care Resource and Referral Network at 1-800-345-0131, or visit their website at [www.mass.gov/eec](http://www.mass.gov/eec). If you are receiving TAFDC, call your local DTA office for a referral.

## Child Support

Every child has the legal right to get money from both parents, whether the parents are separated, divorced or were never married. The child support you receive will help you make a better life for you and your children. If you are not already receiving child support, call the Department of Revenue (DOR) Child Support Enforcement Unit at 1-800-332-2733 or visit their website at [www.mass.gov/cse](http://www.mass.gov/cse).

## Transportation - Access to Jobs

Do you have transportation to and from your job and your child care provider? Is lack of transportation keeping you from finding a good job? If you receive cash assistance, you may be eligible for transportation benefits. Call or visit your local DTA office and ask about "Access to Jobs" or visit their website at [www.accesstojobs.org](http://www.accesstojobs.org).

## Domestic Violence

Domestic violence affects the entire community. Everyone deserves to be safe. If you or someone you know is being abused and you would like more information on what you can do to keep yourself, family or neighbors safe, call or visit your local DTA office and ask to speak to a Domestic Violence Specialist. If it is after hours or an immediate emergency, please call SafeLink at 1-877-785-2020.