

# Transitions



A Publication of the Massachusetts Department of Transitional Assistance

## this month in...

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## From the Commissioner

Dear Fellow Employees,

In carrying out our Department's mission, we have always emphasized work, training, education, childcare and transportation services. While we continue to stress these fundamentals, this year we also plan to raise the profile of the federal Earned Income Tax Credit (EITC), the Massachusetts Earned Income Tax Credit (EIC) and the Child Care Tax Credit (CTC). These credits provide cash from the federal and state governments to qualifying working families, many of whom are our clients. By expanding our annual outreach to a year-long informational campaign, we intend to increase the number of clients taking advantage of these opportunities.

Although I've written to you about these credits before, the details are still worth repeating. In 2007, a single parent who has two children and is earning up to \$36,348 could receive a federal refund of up to \$4,537. When this same individual also files for the Massachusetts EIC, an additional \$680 would be received, totaling \$5,217! Under the Advance EITC Payment Program, our clients may even be eligible to receive a portion of their tax credits during the year, allowing them access to a larger monthly income. The balance of the credit is then paid after the federal tax form is filed. The maximum allowable amount a tax filer can receive in advance is \$1,648. In addition, families who qualify for the CTC may decrease their taxes by as much as \$1,000 for each qualifying child.

Despite these advantages, many Massachusetts households are leaving these assets unclaimed. To turn this around, we've designed an ongoing, long-term strategy. Instead of highlighting these benefits once a year, we want to emphasize the value of these credits throughout 2007. Beginning this month, we plan to mail

out brochures to our TAFDC families, certain former TAFDC families and selected food stamp households. The February mailing will encourage those who are employed or have been employed to file their taxes, request their refunds and credits, consider the Advance EITC payment option and take advantage of any available child care services. A supply of the brochures used in this mailing along with an EITC poster will soon be available in all local TAOs.

Against this backdrop, your role in supplying basic and follow-up information is essential. Each TAO will be receiving an e-mailed list of free tax preparation sites. Encourage clients to visit them for professional help in filing their taxes as well as determining tax credit eligibility. While many of our clients may prefer using the nearest tax preparation site, let them know that they may use any site in Massachusetts. In addition, most AARP sites will assist those who are not senior citizens. For your convenience, this listing will also be posted on the DTA intranet.

More information is also available at [www.masscashback.com](http://www.masscashback.com). For more specific tax preparation inquiries, your clients may also contact the Internal Revenue Service directly by dialing 1-800-829-1040 and the Massachusetts Department of Revenue at 1-800-392-6089 or 617-887-MDOR.

The benefits of working are enhanced for our clients when the right supports are in place. Spreading the word on EITC, EIC and CTC will broaden our clients' pathways to opportunity and add a basic service to our portfolio of job supports. Thank you in advance for your diligence and commitment to this campaign.

Sincerely,



John Wagner, Commissioner

## Quality Corner

This month's Quality Corner is dedicated to the negative error rate.

Quality Control reviews focus not only on benefit over issuances or underissuances, but also on the inappropriate denial or termination of benefits, called negative errors. There are twice as many errors related to denials than to terminations, the majority being NPA FS AUs where the household applied for both cash and food stamps. Federal Fiscal Year 2006 final error rates are not in, but the negative error rate so far appears to be similar to last year's error rate of 3.1%, and the same types of negative errors are being discovered by Quality Control as last year.

### Denials

The two major problem areas resulting in inappropriate denials are *verifications* and *timeliness*.

An example of an inappropriate denial for failure to provide verification occurs when the verification for which the FS AU was denied is an optional verification such as utility expenses or dependent care expenses. In other instances, Quality Control found that the verification for which the AU was denied had actually been provided by the applicant.

Another reason for inappropriate

denials is timeliness. This happens when the application is denied *before* the 30th day for failure to provide verifications or failure to complete the application process. While an application can be denied before the 30th day because of a financial (e.g., over income) or non-financial (e.g., ineligible student) reason, no application should ever be denied before day 30 for failure to provide verifications or failure to complete the application process.

### **What's an AU Manager to Do?**

AU Managers must continue to follow the procedures outlined in Field Operations Memo 2006-38 for processing FS applications. Remember that a combined cash/FS application must be processed with two timeliness standards in mind. Do not confuse cash program time frames with FS Program time frames. AU Managers must give the applicant a BEACON-generated verification checklist and assist the applicant if there is difficulty obtaining a particular verification. AU Managers must be mindful of which verifications are required for food stamps and which are optional. Finally, all verifications received should be promptly entered in BEACON so that an accurate electronic record of the AU is maintained.

## **Closings**

Recently an AU was inappropriately closed because the recipient was using her EBT card out of state.

### **What's an AU Manager to Do?**

When a recipient uses his or her EBT card out of state for an extended period of time, the AU Manager, before taking action on the AU, must follow up to determine if a change in address or change in Massachusetts residency has occurred. The recipient may have a legitimate reason for accessing FS benefits out of state for extended periods of time. In this particular AU, the recipient was seeking employment out of state and caring for an ill relative. However, the recipient maintained Massachusetts residency and was still eligible for FS benefits in this state.

## **From the Hotline**

The questions and answers below concern the Relocation Benefit. More details on this topic can be found in the Transitional Cash Assistance Program regulations at 106 CMR 705.350.

- Q.** If a TAFDC mother requests a Relocation Benefit, is she allowed to use a portion of the benefit to purchase a bed, crib or refrigerator?
- A.** Yes, any of these items could be purchased with the Relocation Benefit, but only when and if the lack of these items prevents the mother from relocating to permanent housing.

For example, a nine-month-old baby may have never received the crib payment available through our Department. (Refer to 106 CMR 705.600.) This piece of furniture/equipment is a safety imperative and fills a fundamental need. Therefore, using the Relocation Benefit for this purpose is appropriate.

- Q.** Does this mean that any piece of furniture can be purchased with the Relocation Benefit?
- A.** No. Certain items of furniture would likely never prevent a family from moving into a permanent location under any circumstances. However, the only specifications in the regulations are related to an assistance unit's inability to secure permanent housing. Since there may be many contingencies

that need to be addressed before a family can move into permanent housing, the regulations do not rule out any one specific item or service.

- Q.** I have a TAFDC family currently staying at a non-EA-funded shelter. Is this family eligible for the Relocation Benefit?
- A.** Yes, as long as the family has been homeless, in shelter for at least 60 days and meets the other requirements at 106 CMR 705.350. Remember, the Relocation Benefit is not an EA benefit.
- Q.** I have a TAFDC family currently staying at a domestic violence shelter. Is this family eligible for the Relocation Benefit?
- A.** Yes, as long as the family has been homeless, in shelter for at least 60 days and meets the other requirements at 106 CMR 705.350. The same applies to a TAFDC homeless family staying at a substance abuse shelter as well as a teen parent, 18 or 19 years of age, in a teen structured living program for 60 days or more who meets the conditions for living independently, as specified in 106 CMR 203.640.
- Q.** I have a TAFDC family that is moving into transitional housing. Is this family eligible for a Relocation Benefit?
- A.** No. Transitional housing is not considered permanent housing. However, if the family leaves the transitional housing for a permanent location and otherwise meets the eligibility criteria, then a Relocation Benefit may be issued once the more permanent location is found.

Note: For Food Stamp Program purposes, the Relocation Benefit is considered an excluded vendor payment, per 106 CMR 363.230(B).

The second question and answer in “*From the Hotline*” (December 2006) has been removed from the on-line version. The corrected version is below.

- Q.** A father with over five years of Legal Permanent Resident status has been receiving food stamp benefits and TAFDC. He lives with his two children. One of his children has an eligible noncitizen status but was recently taken out of the TAFDC AU because she is 18 years old. The other child is only ten years of age, but he doesn't have an eligible noncitizen status for either

TAFDC or the Food Stamp Program. Can I leave the father on TAFDC as an open AU consisting of one individual?

- A.** No. Although a parent with an only child on SSI may continue receiving TAFDC benefits as an AU of one person, there is no regulation that allows for this arrangement when the only otherwise eligible child in the home does not meet our noncitizen requirements. Refer to 106 CMR 204.305(E).

If otherwise eligible, the father and the 18-year-old eligible noncitizen child may continue receiving food stamp benefits as an AU of two individuals.

## **From the Forms File**

### **New Poster**

26-406-0107-05

26-407-0107-05 (S)

OCR Poster 2 (1/2007)

*Notice of Resolution Agreement*

This poster must be displayed in TAO waiting areas as part of the Office of Civil Rights (OCR) and DTA Agreement regarding the Learning Disabled. Please refer to Field Operations Memo 2007-1 for more information.

## New Form

25-642-0207-05

25-643-0207-05 (S)

CCFS (2/2007)

*Child Care Fact Sheet*

This *Child Care Fact Sheet* replaces the *Child Care - Getting and Keeping Child Care* (Rev. 1/2006) brochure. Please discard the brochure and use the fact sheet.

## Revised Form

*Voter Registration Form*

The *Voter Registration Form* has been changed. Two new political parties have been added to the form. An initial supply will be sent to TAOs and the form is available to order online.

## Obsolete Brochure

02-820-0106-05

02-822-0106-05 (S)

CC-1 Mail (Rev. 1/2006)

*Child Care: Getting and Keeping Child Care*

This brochure is obsolete and has been replaced with the *Child Care Fact Sheet* (CCFS).



## TAFDC - OCR/DTA Agreement Regarding the Learning Disabled: Department Obligations

TAFDC

Field Operations Memo 2007-1

Field Operations Memo 2005-58 advised TAO staff about a pending agreement with the Office of Civil Rights (OCR) to provide Learning Disability screenings to applicants and recipients and included procedures for conducting the screenings.

The Department and OCR have finalized the Resolution Agreement to ensure that eligible TAFDC applicants and recipients with learning disabilities have equal access to participate in DTA's Employment Services Program (ESP). DTA signed the agreement to ensure that TAFDC applicants and recipients have the opportunity for screening and assessment for learning disabilities.

The purpose of this memo is to inform TAO staff about the Department's obligations under the agreement with OCR.

## 2007 Social Security/SSI COLA for TAFDC, EA, EAEDC and FS

All

Field Operations Memo 2007-2

Effective January 2007, Social Security Benefits and SSI payments increased by 3.3 percent. The basic level Medicare Part B Premium increased from \$88.50 to \$93.50. The Medicaid Part B Penalty Premium also increased. The Bay State CAP SUA has been increased from \$268.00 to \$297.00. This Field Operation Memo:

- explains how BEACON updated APs with the 2007 Social Security/SSI COLA amount and recalculated eligibility for the active AUs containing the updated APs;
- explains which AUs listed on the "Clients With RSDI and/or SSI" view require AU Manager action; and
- transmits procedures for AU Managers to update AUs with discrepant 2007 Social Security/SSI COLA amounts.

"Character is like a tree and reputation like its shadow. The shadow is what we think of it; the tree is the real thing."

Abraham Lincoln

## **The Work Number**

All

Field Operations Memo 2007-3

The Work Number is an Internet-based resource that may be used by AU Managers to assist the applicant/recipient in obtaining employment-related information. The Work Number provides basic employment information from over 1000 employers free of charge to registered social service agencies through its Standard Service. This Field Operations Memo serves to:

- explain the circumstances under which the Work Number can be used to verify employment-related information ;
- describe how the Work Number's Standard Service can be accessed; and
- describe the steps to follow to request and receive information from the Work Number.

## **Miscellaneous Administrative Food Stamp Changes**

FS

State Letter 1321

This State Letter transmits the following administrative changes to food stamp policy:

- reinstate erroneously deleted policy regarding the exclusion of child support payments when determining assistance unit eligibility and benefit level;
- remove references to use of actual utility costs as a deduction, which no longer applies, as the state has adopted a mandatory standard utility allowance;
- clarify policy regarding the use of a standard utility allowance for an unoccupied home to allow only one standard utility deduction, whichever is highest;
- clarify categorical-eligible rules for assistance units with a combination of cash benefits; and
- clarify the treatment of earned income in Bay State CAP assistance units.

## **FYI**

### **BEACON Online Help Updates Issued in January 2007**

BEACON Online Help  
Update Issue # 5 (1/26/07)

## **FYI**

### **Changes to DTA Online**

This month you will see the following changes to DTA Online:

#### **Resource Inventories - Earned Income Tax Credit**

An updated summary about the Earned Income Tax Credit precedes the links relating to tax information.

The list of links has been reordered and includes the following new links:

- *Mass Earned Income Tax Credit (EIC); and*
- *Free Tax Preparation Assistance Agencies (AARP), Volunteer Income Tax Assistance Sites (VITA).*

#### **Training**

A new job aid entitled *Creating and Changing Your Outlook Password* has been added to the list of available job aids.

## **FYI**

### **Changes to the EOHHS Mass.gov DTA Homepage**

This month you will see the following changes to the EOHHS mass.gov DTA homepage.

#### **News and Updates**

A link entitled *Notice of Resolution Agreement* has been added to the list of available options. When selected, the notice of the signed agreement between the U.S. Department of Health and Human Services Office for Civil Rights and the DTA will be displayed.

#### **Research and Statistics:**

The link to DTA Facts and Figures has been updated with January 2007 Grant Levels, Eligibility Standards and FY'07 Appropriations.

The program links (Emergency Aid to the Elderly, Disabled and Children; Food Stamps; Homeless; Supplemental Security Income; and Transitional Aid to Families with Dependent Children), when selected, display updated caseload information.

## **FYI**

### **Medicare Part D Deductible Changes for 2007**

The Medicare Modernization Act allows for changes in the Medicare Part D prescription

benefit each year. This means that each January participants will see a change in the amounts they pay for the premium and for the deductible. As stated in Field Operations Memo 2006-3, Medicare Part D has three levels of participation: Standard, Partial Extra Help or Full Extra Help. The overwhelming majority of FS-eligible participants qualify for either Full Extra Help or Partial Extra Help due to low income and assets. Therefore, some FS-eligible participants will continue to pay no premium or deductible, while others will pay a low premium and a low deductible.

As of January 1, 2007, the Standard deductible was increased from \$250 to \$265, the Partial Extra Help deductible was increased from \$50 to \$53 and the Full Extra Help deductible remains at \$0. The Medical Expenses window has been programmed to accept the new deductible amounts. The Health Insurance window did not require any reprogramming; it will continue to accept the varying Medicare Part D premium amounts.

## **FYI**

### **TAFDC - ESP Increased Capacity**

Due to increased demand, capacity has increased for the following ESP programs in the following TAOs:

#### **Activity:**

Supported Work and (including Job Search/ Job Readiness)

Vocational Rehabilitation Services (including Job Search/ Job Readiness)

Division of Career Services (DCS)(Job Search/ Job Readiness)  
Office for Refugee and Immigrants (ORI) (including Job Search/Job Readiness)

#### **TAOs:**

Fall River, Lawrence Lowell

Dorchester, Boston Family Housing, Newmarket Sq., Former Davis Sq., Lowell and Lawrence. Outreach to additional providers in Worcester, Fall River and Framingham is ongoing

Brockton, Revere, Worcester, Malden, Fitchburg, and Taunton

Increasing capacity statewide at current locations.

TAOs will be notified as additional capacity increases.