

# **Termination of Monthly Reporting & the Automation of TAFDC Reevaluations**

DTA Training Unit

# Today's Objectives

1. Discuss the termination of Monthly Reporting
2. Review the processing procedures associated with automated TAFDC reevaluations

# Farewell Monthly Reporting

Effective December 2015, all TAFDC households with earned income will no longer have to complete a Monthly Report to verify income received.



# Notice of Discontinuation

During the week of November 23-27, 2015 clients on Monthly Reporting will be sent a letter informing them that they will no longer have to complete a MR. It will also inform them of their reporting requirements.

# How will Clients Report Income?

As Monthly Reports phase out, the BEACON system will use the income and hours from the client's last Monthly Report to determine the household's grant amount and participation levels.

Eventually earned/unearned income will be reported on a Pre-filled Reevaluation form. The client's income will be used prospectively to determine their TAFDC grant for 6 months. Furthermore, the client's weekly employment hours will be used to determine their participation level for the TAFDC Work Program for 6 months.

If at any time during the certification period the client reports new income/hours, these figures will be used to re-determine the prospective grant and participation hours.

# What's Next?

## Automated Reevaluations

Many TAFDC households will be reevaluated every 6 months. This is an important opportunity to engage with clients about any barriers they may have to economic self-sufficiency, encourage participation in work-related activities, and discuss support services.

The following households will be reevaluated every 12 months:

- SSI Head of Household
- Two Parent Households Where Both Parents are on SSI
- Non-legally Liable Grantee Households

# Automatic Case Closure

If the client fails to comply with reevaluation procedures or the case manager fails to complete the reevaluation process timely, TAFDC cases will automatically close.



# Reevaluation Process

- Forty-five days before the end of the reevaluation period, a TAFDC client will receive a pre-filled reevaluation form...
  - Prior to Month 06: TAFDCSR (Cash Only)
  - Prior to Month 12: COMBOSR (Cash and SNAP)
- If the reevaluation form is not returned and initiated within 15 days of the form being sent out, the Reevaluation End Warning Notice is generated (only if there is more than 10 days left before the reevaluation end date).
- If the reevaluation form is not returned by the end of the reevaluation period, the case closes on the release date associated with the reevaluation end date.



# Reevaluation Process continued...

- If the client returns a completed reevaluation form, the case manager will:
  - Initiate the reevaluation
  - Attempt a cold call interview
  - And if cold call is unsuccessful, schedule an appointment for a telephonic or face to face interview
- If the client misses their scheduled appointment and has not called to reschedule, a Notice of Missed Interview will be sent out that night.
- If the reevaluation form is returned, but no interview has been conducted by the end of the reevaluation period, then the case will close on its release date and the Notice of Benefits Ending (No NOMI Response) is generated on the reevaluation end date.

# Reevaluation Process continued...

- If the reevaluation form is returned and initiated in BEACON, but no appointment is scheduled and no interview is marked as conducted, BEACON will automatically generate an appointment letter that night.
- If the reevaluation form is returned and initiated in BEACON, the interview conducted, and a VC- I generated. But the client fails to provide verifications timely, then the case will close on its release date and the Notice of Benefits Ending (Missing Verification) is generated that night.

# Reevaluation Process continued...

- If the reevaluation form is returned and initiated in BEACON, the interview conducted, but a VC-I is not generated and sent out by the case manager, BEACON will automatically generate a VC-I requesting outstanding verifications that night.
- If the reevaluation form is returned and all information for the review is collected and processed timely, but the case manager fails to authorize the case by the release date, the case will close and the Notice of Benefits Ending will generate that night.

# Telephone Contact at Reevaluation

Telephone interviews are strongly encouraged for reevaluation purposes. They are a convenience for both clients and department staff. Some clients may have trouble getting to the TAO or travel to the TAO is costly. The Department does not mandate face to face interviews for reevaluation purposes.



# Reinstating Reevaluations

Cases that close for less than 30 days can be reinstated back to the day after closing only if the client has a reevaluation completed and meets all other eligibility requirements.

If the case manager determines that verifications are needed to complete the reevaluation, a VC-I will be sent out to the client. If the client does not return the required verifications within the 30 day period after case closure, the case will transition from a pending status to closed.

Clients with cases that have been closed for more than 30 days will be directed to reapply for benefits.

Note: Proration does not take place for Cash cases, but will take place for SNAP cases.