



*Commonwealth of Massachusetts  
Executive Office of Health and Human Services  
Department of Transitional Assistance*

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**Online Guide Transmittal 2016-24  
May 20, 2016**

**To:** Department of Transitional Assistance Staff

**From:**  Sarah Stuart, Associate Commissioner for Program and Policy Implementation  
 Paul Sutliff, Assistant Commissioner for Field Operations

**Re:** TAFDC: Changes to the Reevaluation Automation Process and Other BEACON and Online Guide Changes

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**Overview**

The Department is making a number of changes to the TAFDC Reevaluation process.

Enhanced automated processes have been designed to ensure the timely eligibility reviews of TAFDC cases. The automated TAFDC reevaluation process sending clients pre-filled Reevaluation forms 45 days before the end of the TAFDC reevaluation period that was suspended, will not be part of this process.

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**Purpose**

This Online Guide Transmittal advises DTA staff about:

- changes to the automated TAFDC reevaluation process;
  - revised telephone and face-to-face reevaluation appointment letters;
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**Purpose  
(continued)**

- a Pathways to Self-Sufficiency Program assessment requirement for TAFDC reevaluations; and
  - other changes to BEACON and to the Online Guide.
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**Changes to the  
Automated  
TAFDC  
Reevaluation  
Process**

Effective with BEACON Build 48.3e, scheduled for May 23, 2016, automation of the TAFDC reevaluation process will resume with the following changes:

- Pre-filled Reevaluation forms will **not** be sent to TAFDC clients prior to a reevaluation interview;
- Case managers are responsible to monitor clients' Reevaluation end dates on their **Daily Priority Actions – Reevaluation Due** view and other views, and schedule reevaluation appointments 30 days before the reevaluation end date;

**Note:** TAFDC cases with a reevaluation date ending on 6/24/2016 or later will be part of the automated reevaluation process. All TAFDC cases with a Reevaluation end date on or before this date must be processed manually.

A list of clients will provided under separate cover from this Online Guide Transmittal. However, all clients are available on the case manager's Daily Priority Actions – Reevaluation Due view.

- If the case manager has not generated an appointment letter 30 days before the reevaluation end date, or has not initiated the Reevaluation in BEACON (initiated only when an appointment was held), a systems-generated reevaluation appointment letter will be automatically sent after day 30;
- The TAFDC case will be automatically closed when a scheduled reevaluation appointment is missed, or the appointment date has not been rescheduled in BEACON before the appointment date has passed; and
- The SNAP Notice of Missed Interview (NOMI) will **not** automatically be sent by BEACON when a cash combo client (cash/SNAP) fails to keep a TAFDC or EAEDC reevaluation interview appointment.

**Important:** The cash case manager must initiate and send the NOMI from the Letter Request page or the Reevaluation Due view for the SNAP portion of the missed appointment.

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**Changes to the Automated TAFDC Reevaluation Process (continued)**

- When a closed TAFDC case is reinstated, a Reevaluation will **not** automatically be performed. The case manager must initiate and perform the TAFDC Reevaluation following established procedures.

Additional changes and automations are described in the appropriate Online Guide pages.

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**BEACON Reevaluation Page:**

**SNAP Hard Edit**

A hard edit has been added to the Reevaluation page to prevent the initiation of a SNAP case recertification when there are more than 45 days remaining in the SNAP recertification period. The edit is also applied to Bay State CAP households and SSI Mail-In recertifications.

For a cash combo case, the edit is applied when the case manager initiates the cash case reevaluation, and tries to initiate the SNAP recertification prematurely. The edit provides him/her with the earliest date the SNAP case can be recertified.

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**Revised Reevaluation Appointment Letters**

Revisions have been made to the *Telephone Appointment for {Program\_Type} Reevaluation Interview* and the face-to-face *Appointment for {PROGRAM} Reevaluation* letters to simplify language and improve readability.

When the case manager schedules or reschedules a reevaluation appointment, one of these appointment letter types **must** be generated from BEACON.

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**Reevaluations and the Pathways to Self-Sufficiency Program**

In upcoming months, the Department will roll out its Pathways to Self-Sufficiency (PSS) program. PSS is designed to allow case managers and clients to determine what steps are needed for the client to reach economic self-sufficiency. With each reevaluation, a PSS assessment must be performed.

In the near future, details about PSS and implementation activities will be communicated to all staff.

Staff are reminded that the TAFDC Reevaluation is an important opportunity to engage clients in conversation about how they are moving to self-sufficiency, work activities, available support services and the benefits of transitioning to employment.

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**Eliminated  
BEACON Online  
Guide Page**

The following page in the TAFDC topic section is being eliminated from the Online Guide:

**Topic:** TAFDC  
**Book:** Basic Case Activities & Maintenance  
**Chapter:** Reevaluations  
**Page:** Reevaluation Notices Timeline

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**New BEACON  
Online Guide  
Page**

Automations for the TAFDC Reevaluation process are outlined in a new Online Guide page titled, Enhanced Automations for the TAFDC Reevaluation Process.

**Topic:** TAFDC  
**Book:** Basic Case Activities & Maintenance  
**Chapter:** Reevaluations  
**Page:** Enhanced Automations for the TAFDC Reevaluation Process

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**Updated  
BEACON Online  
Guide  
Books/Pages**

**Topic:** TAFDC  
**Book:** Basic Case Activities & Maintenance  
**Chapter:** Reevaluations  
**Page:** Reevaluations Overview

**Topic:** TAFDC  
**Book:** Basic Case Activities & Maintenance  
**Chapter:** Reevaluations  
**Page:** Reevaluations-Related View and Actuate Report

**Topic:** TAFDC  
**Book:** Basic Case Activities & Maintenance  
**Chapter:** Reevaluations  
**Page:** Case Manager Responsibilities for Reevaluations

**Topic:** TAFDC  
**Book:** Basic Case Activities & Maintenance  
**Chapter:** Reevaluations  
**Page:** Reevaluations - TAFDC

**Topic:** TAFDC  
**Book:** Basic Case Activities & Maintenance  
**Chapter:** Reevaluations  
**Page:** Reevaluations Q and A

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**Updated  
BEACON Online  
Guide  
Books/Pages  
(continued)**

**Topic:** TAFDC  
**Book:** Basic Case Activities & Maintenance  
**Chapter:** Reevaluations  
**Page:** Reevaluation following TAFDC Reinstatement

**Topic:** TAFDC  
**Book:** Basic Case Activities & Maintenance  
**Chapter:** Views  
**Page:** Daily Priority Actions Views

**Topic:** TAFDC  
**Book:** Basic Case Activities & Maintenance  
**Chapter:** Verifications  
**Page:** Verifications at Reevaluations and Case Maintenance

**Topic:** TAFDC  
**Book:** Basic Case Activities & Maintenance  
**Chapter:** Verifications  
**Page:** Client Responsibilities for Verifications

**Topic:** TAFDC  
**Book:** Program Nonfinancial Requirements  
**Chapter:** Extension of Benefits Beyond the 24-Month Period  
**Page:** Extension Request Views and Edit

**Topic:** EAEDC  
**Book:** Basic Case Activities & Maintenance  
**Chapter:** Reevaluations  
**Page:** Reevaluations Case Manager Responsibilities

**Topic:** EAEDC  
**Book:** Basic Case Activities & Maintenance  
**Chapter:** Views  
**Page:** Daily Priority Actions Views

**Topic:** SNAP  
**Book:** Reporting Requirements/Recertifications  
**Page:** SNAP Reporting Requirements and Recertification

**Topic:** Cross Programs  
**Book:** Appointments  
**Chapter:** TAFDC Appointments  
**Page:** Schedule Appointment Page TAFDC

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**Updated  
BEACON Online  
Guide  
Books/Pages  
(continued)**

**Topic:** Cross Programs  
**Book:** Appointments  
**Chapter:** EAEDC Appointments  
**Page:** Schedule Appointment Page EAEDC

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**Questions**

If you have any questions, please email the DTA Mailbox.  
Systems questions should be directed to the Systems Support Help Desk.

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