



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

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Governor


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Secretary

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Lieutenant Governor

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Commissioner

**Online Guide Transmittal 2018-88  
December 21, 2018**

**To: Department of Transitional Assistance Staff**

**From:**  **Paul Sutliff, Assistant Commissioner for Programs  
and Field Operations**

**Re: Economic Assistance (EAEDC and TAFDC) – Retroactive Payments  
Due to Budget Changes**

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**Overview**

As part of the budget process this year, the following changes occurred:

- most ongoing TAFDC clients are eligible to receive a 100% Earned Income Disregard as long as the total household countable income does not exceed 200% of the Federal Poverty Level (FPL) for up to 12 cyclical payments;
- the TAFDC asset limit was raised from \$2,500 to \$5,000 in all eligibility and benefit calculations;
- the grant amount for TAFDC Non-Exempt Assistance units was increased 2.75%; and
- the benefit amount for EAEDC clients in Living Arrangement D (those who are homeless) was increased to \$303.70 for a single individual.

These changes were effective July 1, 2018 but did not occur until November 2018. As a result, some clients are owed retroactive benefits.

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**Purpose**

The purpose of this Online Guide Transmittal is to advise staff about retroactive payments that are owed to Economic Assistance clients, potentially from July 1 until the benefit changes were enacted.

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**TAFDC  
Retroactive  
Payments for  
Earnings  
Disregard and  
Grant increase**

TAFDC clients, who are owed a retroactive benefit based on the earnings disregard and grant changes, will have those benefits calculated by BEACON and a payment processed on the night of December 21<sup>st</sup>, 2018. The retroactive payment will be a combination of the grant increase change plus the earned income disregards change, as appropriate. Additionally, based on:

- when a client was active at a lower grant,
- when his/her case closed, and
- if his/her case was reopened,

will determine the period the retroactive benefits will cover.

**Example:** Mary Jones was a TAFDC client who was active from May of 2018 through August of 2018. She closed due to earnings in August. She did not reapply and reopen. Her retroactive benefit is based on her eligibility for the months of July and August. If Mary had reopened her case in November, her retroactive benefit would be the total of benefits owed from July through her reopening date in November.

Additionally, for clients who were invited to reapply and who were reestablished after the December 21<sup>st</sup> run date for retroactive benefits, an additional automated calculation of retroactive payments will be made in March 2019 and benefits issued, if appropriate. Field staff will be advised before this occurs.

A separate non-EBC notice (Attachment A) will be issued to these clients explaining to them why they are receiving the payment. The current Related Benefit notice will be suppressed.

The payment is considered noncountable income for TAFDC and SNAP.

A listing of clients receiving the payment will be sent to TAOs once the payments have been issued. The payments will be broken down by month received. The benefits will be issued in the same manner the client currently receives/received their benefits: EBT card or Direct Deposit.

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**TAFDC  
Retroactive  
Payments for  
Excess Assets**

There were approximately 70 TAFDC clients who were denied or closed due to being over the asset limit. They were sent a letter inviting them to come to the TAO to reapply. If a client who was closed or denied due to excess assets since July 1, 2018, comes to the TAO to reapply and is under the current asset limit of \$5000, s/he should be reopened and issued a retroactive payment for the period s/he was closed provided all other existing financial and non-financial criteria is met. Case managers must go to the Related Benefit page and select “Retro Payment for Supplement” to issue the benefit. The payment is considered noncountable income for TAFDC and SNAP.

**Example:** Mary Smith was closed for being over assets in September. She came back to reapply in December. Her assets are less than \$5000. She is otherwise eligible. The case manager would establish her case and issue a retroactive payment for October and November and any benefits owed in December up to the start date.

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**TAFDC  
Retroactive  
Payments and  
Related Benefits**

Clients who receive retroactive benefits will be eligible for Transportation benefits for months worked during the retroactive period and Clothing Allowance for each eligible child if part of the retroactive benefit covers the month of September.

For each client on the report, case managers must review months received for the retroactive benefit:

If the client was working during that time, determine how many months they were working from July through October and issue a Related Benefit for Transportation for those number of months.

**Example:** Mary Smith received a retroactive payment for August, September and October. Mary was working that same time from August through October. Mary is owed transportation benefits for the three months at \$80 per month or a total of \$240. Mary’s case manager will issue a related benefit for Transportation for \$240. The benefit type is: Transportation.

If the client was eligible for retroactive benefits in September and did not previously receive a clothing allowance payment, the client will be marked with a “Y” under Potential Clothing Allowance Needed column. Case managers must determine the number of eligible children and issue a related benefit of \$350 for the clothing allowance per eligible child.

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**TAFDC  
Retroactive  
Payments and  
Related Benefits  
(continued)**

**Example:** Mary Jones received a retroactive benefit that covered the month of September and October. She is eligible to receive the clothing allotment for her eligible children. Mary has three children: one is receiving SSI, one is subject to the Family Cap rule and the final child is eligible for TAFDC. Mary's case manager would issue a related benefit for \$350. The benefit type is: Related Benefit for Supplement.

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**EAEDC  
Retroactive  
Payments**

There are approximately 570 EAEDC clients in Living Arrangement D who are currently active and 12 who are pending who are owed a retroactive benefit based on the EAEDC grant change from \$92.80 to \$303.70. These clients will be paid retroactive benefits based on the months they were active during July through October.

**Note:** This also includes clients who are currently active but who were closed for income sometime during the period between July 1 and October 25 when the change took place.

The maximum benefit these clients will receive is \$843.70 (\$303.70 - \$92.80 x 4 months). If a client is eligible for the maximum retroactive benefit (or any retroactive benefit that is more than \$250) those retroactive benefits will be issued automatically in monthly increments to prevent clients from exceeding the asset limit.

Clients will have those retroactive benefits calculated by BEACON and a payment processed on the night of December 28<sup>th</sup>, 2018. One payment and notice (Attachment B) will go out in December. The additional payments will all be created in December with future dates in the related benefit page and will be released monthly along with Attachment B.

**Important:** Those benefits must not be changed by TAO staff.

The current Related Benefit notice will be suppressed.

These benefits are noncountable for SNAP.

No additional case manager action is needed for these cases.

For clients that became active between 12/28 and 12/31 a report will be run and those cases will be processed at Central Office.

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**EAEDC  
Retroactive  
Payments for  
Closed Clients**

Closed EAEDC clients, who are owed a retroactive benefit, will have those benefits calculated by BEACON and a payment processed on the night of December 28, 2018. These clients will be issued a one-time payment of the total amount of retroactive benefits that are owed them because since they are closed, they have no asset limit.

Attachment C will be sent to former clients at their last known address informing them of the benefit.

No case manager action is needed for these cases.

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**Questions**

If you have any policy or procedural questions, after conferring with the appropriate TAO personnel, please have your Systems Information Specialists or TAO management email the DTA Mailbox.

Systems issues should be directed to the Systems Support Help Desk.

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**Massachusetts Department of Transitional Assistance**

Mary Jones  
101 Main Street  
Somerville, MA 02148

Agency ID: 9999999

Date: 12/21/2018

**AN IMPORTANT NOTICE ABOUT TAFDC CASES RETRO PAYMENT**

Dear Mary Jones:

A state law passed effective July 1, 2018 adjusting TAFDC grant amounts. The grant for your household size changed from \$539.00 to \$579.00.

If you were working between July 1, 2018 and September 25, 2018, DTA should not have counted any of your earnings when calculating your grant.

Because of these changes, you will be receiving a benefit of \$1,737.00. This payment covers the period between July 1, 2018 and October 25, 2018.

If you have trouble reading or understanding this notice, you may call your case manager Mary Smith at 781-999-9999 for help.

If you disagree with this decision, you can request a fair hearing. To request a fair hearing, complete the form on the other side of this notice. You must file the appeal within 90 days of getting this payment.

To ask about free legal services, call: Greater Boston Legal Services at 1-800-323-3205.

The law used in this decision is Chapter 154 of the Acts of 2018.

{CLIENT NAME}

{Agency ID}

{CLIENT ADDRESS}

{CLIENT ADDRESS}

{DATE}

**AN IMPORTANT NOTICE ABOUT ACTIVE EAEDC CASES RETRO PAYMENT**

Dear {CLIENT NAME}:

A state law passed effective July 1, 2018 adjusting EAEDC grant amounts. The grant changed from \$92.80 to \$303.70.

Because of this change, you will receive a total of {TOTAL RETROACTIVE AMOUNT}. This month you are receiving \$ {MONTHLY TOTAL OF RETROACTIVE AMOUNT} of that total. You will get your benefit on your EBT card. If you need a new EBT card and your case is closed, you can come to the TAO to get a new EBT card.

Please remember that the EAEDC asset limit is \$250.

If you have trouble reading or understanding this notice, you may call your case manager.

If you disagree with this decision, you can request a fair hearing. To request a fair hearing, complete the form on the other side of this notice. You must file the appeal within 90 days of getting this payment.

To ask about free legal services, call: {LOCAL LEGAL SERVICES NUMBER}.

The law used in this decision is Chapter 154 of the Acts of 2018.

**Attachment C**

{CLIENT NAME}

{Agency ID}

{CLIENT ADDRESS}

{CLIENT ADDRESS}

{DATE}

**AN IMPORTANT NOTICE ABOUT EAEDC CASES RETRO PAYMENT**

Dear {CLIENT NAME}:

A state law passed effective July 1, 2018 adjusting EAEDC grant amounts. The grant changed from \$92.80 to \$303.70.

Because of this change, you will receive a total of \${RETROACTIVE BENEFIT AMOUNT}. If you need a new EBT card and your case is closed, you can come to the TAO to get a new EBT card.

If you disagree with this decision, you can request a fair hearing. To request a fair hearing, complete the form on the other side of this notice. You must file the appeal within 90 days of getting this payment.

To ask about free legal services, call: {LOCAL LEGAL SERVICES NUMBER}.

The law used in this decision is Chapter 154 of the Acts of 2018.