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Field Operations Memo 2000-28
September 27, 2000

To: Transitional Assistance Office Staff

From: Joyce Sampson, Assistant Commissioner for Field Operations

Re: BEACON Release 2.0 Conversion Validation

Overview

Following the completion of the *BEACON Release 2.0 Concepts, Conversion and Crosswalks* Training, Implementation Managers, TAO Supervisors and AU Managers will validate a sample of converted data to reinforce what was learned at training and identify any problem areas.

The purpose of this Conversion Validation Memo is to inform TAO Staff how to:

- validate that a caseload has been converted to BEACON Release 2.0 for every AU Manager in a TAO;

- validate an AU Manager's specific caseload;

- validate a sample of benefit discrepancies;

- validate a sample of data types; and

- send information to the BEACON Action Center.

The activities outlined in this memo should be completed one week following *BEACON Release 2.0 Concepts, Conversion and Crosswalks* training.

Background of Conversion

Conversion is the process of populating the BEACON Release 2.0 database with information from PACES, PRISM II, FMCS and BEACON Release 1.0. The process of building the BEACON Release 2.0 database began in 1996 when all FMCS cases dating back to 1989 were converted to PRISM. All cases added/changed on PACES/FMCS were also updated nightly on PRISM.

Background of Conversion (continued)

In September 1998, with the implementation of BEACON Release 1.0, all cases in PRISM plus the data from ESP-MIS were used to create the BEACON Release 1.0 database. The BEACON Release 1.0 database is updated nightly.

The starting point for BEACON Release 2.0 conversion is **all the Assistance Units and clients** with their respective status **as currently reflected on the Release 1.0 database.** The selected data listed in Attachment A from FMCS, PACES, and PRISM II were then converted to BEACON for all active and pending AUs and clients.

In addition, where no data field is available in an existing system, but the data field is required by BEACON and its value could be reasonably derived, a "default" value was created. These default values will allow users to calculate benefits and conduct routine case maintenance without being required to update any of the converted/default data.

Once the data conversion process is complete, BEACON recalculates a benefit payment for all active TAFDC, EAEDC and FS AUs and compares the BEACON Benefit Amount to the PACES/FMCS Benefit Amount. If the amounts are the same, this amount becomes the BEACON Authorized Benefit Level and the AU will not be listed on the Conversion Benefit Discrepancies view. Both the PACES/FMCS Benefit Amount and the BEACON Benefit Amount appear in the Results tab on the Eligibility Explorer.

If the amounts are not equal, the AU will be displayed with both amounts on the Conversion Benefit Discrepancies view for user intervention. The AU will continue to receive the PACES/FMCS Benefit Amount until the discrepancy is resolved and the user authorizes an EBC Result and the Interview Wrap-up Request is released.

Until that happens, just the PACES Benefit Amount will be displayed on the Results tab on the Eligibility Explorer.

The BEACON Benefit Amount is displayed within the Interview Wrap-up window. Upon entering the Interview Wrap-up window, a Request with a Status of Pending Authorization will be displayed. To view the details of the BEACON Benefit Amount, select the EBC Results button.

Note: Converted data show on BEACON Release 2.0 as of a specific date and are not updated with subsequent additions/changes made to PACES. Subsequent additions/changes will appear on BEACON Release 2.0 once a new conversion is run.

**AU Managers'
Responsibilities**

AU Managers will receive *BEACON Release 2.0 Concepts, Conversion & Crosswalks* training on a staggered basis. Following the first day of training, the AU Manager will begin **validating his or her specific caseload.**

Validating AU
Manager's
Specific
Caseload

The AU Manager will:

- print the following views from the BEACON 1.0 TAO Office Explorer:
    ✓ "Active Component Activities by Grantee Name" View under "ESP Assistance Units" group; and
    ✓ "Child Care AUs by Client Name" View under "Assistance Unit Lists" group.

- print the following views from the BEACON Release 2.0 TAO Office Explorer:

    ✓ "Active by Program" View under the "Assistance Unit Lists" group;
    ✓ "Pending Applications" View under the "Daily Priority Actions" group;
    ✓ "Active Component Activities by Grantee Name" View under "ESP Assistance Units" group; and
    ✓"Child Care AUs by Client Name" View under "Assistance Unit Lists" group.

- use the *PACES FMCS Case Data* report or generate an ARTS query to compare the caseload to that listed on the BEACON Release 1.0 and BEACON Release 2.0 views listed above;

    Note: When generating the ARTS report, use the same timeframe used for the converted data to ensure the same information is downloaded. The *PACES FMCS Case Data* report lists all pending, active and recently closed PACES/FMCS Category 2, 4 and 9 cases.

- if any cases are missing from BEACON Release 2.0, enter the name or SSN of the Grantee on the Client List window to navigate to the Eligibility Explorer to determine:
    ✓ the existence of the AU on BEACON;
    ✓ the current status of the AU; and
    ✓ the current AU Manager's caseload that the AU is listed on.

- if any cases are missing from either PACES, BEACON Release 1.0 or BEACON Release 2.0, use the *Validation of Caseload Document* to list on which system(s) the case was found, which system(s) it was not found and annotate the reason for the discrepancy, if known. See the section on Accessing BEACON Release 2.0 Pilot Forms for this document; and

- e-mail a *Validation of Caseload Document* for each AU with a discrepancy to the TAO Supervisor who will review and forward it to the Implementation Manager.

**AU Managers'
Responsibilities
(continued)**

Once the AU Manager validates the caseload, he or she will begin **Validating Benefit Discrepancies.** AU Managers must select a minimum of *five* AUs listed on the "Conversion Benefit Discrepancies" View. This view identifies any discrepancies between the BEACON Benefit Amount and the PACES/FMCS Benefit Amount.

Validating
Benefit
Discrepancies

The AU Manager will attempt to identify the discrepancy using the steps listed below.

The AU Manager will:

- open the Eligibility Explorer and access the PACES case on the WB option on the mainframe;

- on the Eligibility Explorer select:

  ✓ the AU Inquiry tab to review the Eligibility Group(s) created during the conversion process and to view specific client/AU membership information;

  ✓ the Results tab to view the last (PACES) benefit amount; and

  ✓ the Interview tab to view the Interview Wrap-up section. The Interview Wrap-up window will display a Request with the status of Pending Authorization. This Request was created by the Conversion EBC process when the results between PACES and BEACON were discrepant.

    Note: If the data is not displayed on the Interview Wrap-up window, report the problem and select another AU to validate.

    From this window:

    - select the Pending Authorization;

    - click on the EBC Results push-button;

    - select the AU in the EBC Results window to view the (BEACON) benefit amount that was calculated by the Conversion EBC process; and

    - click on the Financial tab to view the details of the calculation.

AU Managers' Responsibilities (continued)

- compare all related data on PACES and BEACON to find out why the benefit amounts differ (i.e., compare income, shelter costs, SUAs, household size, etc.);

- if the reason for the discrepancy is found to be caused by incorrect data converted from PACES, PRISM II, or BEACON Release 1.0, make the correction on the appropriate system.

    Note: Additions/changes made on PACES, PRISM II, or BEACON Release 1.0 will be passed into BEACON Release 2.0 when a new conversion is run.

Validating Data Types

Once the AU Manager identifies discrepancies between the BEACON Benefit Amount and the PACES/FMCS Benefit Amount, he or she will begin **Validating Data Types**. AU Managers must choose a sample of *three* AUs which are **not listed on the "Conversion Benefit Discrepancies" View** and validate that each data element was converted correctly to BEACON.

The AU Manager will:

- follow the items listed on the *Conversion Validation Document* and annotate the outcome of the converted data; and

- e-mail the *Conversion Validation Document* for each sample case with a discrepancy to the TAO Supervisor who will forward it to the Implementation Manager.

TAO Supervisors' Responsibilities

TAO Supervisors **remain** BEACON coaches to their unit staff and must monitor each AU Manager's conversion activities. TAO Supervisors must review all BEACON-related activities as well as assist AU Managers in identifying/resolving discrepancies between BEACON and PACES Benefit Amounts, if possible.

Each TAO Supervisor must review and compile the information from the AU Managers for the conversion activities outlined in this memo. TAO Supervisors are responsible for e-mailing the information to Implementation Managers who will e-mail unduplicated problems/issues to the BEACON Action Center.

In addition, the TAO Supervisor will summarize the activities completed to date by their unit staff using the *Summary of Conversion Activities Document* and e-mail the information to the Implementation Manager who will forward it to the Regional Director.

Implementation Managers' Responsibilities

Following the *BEACON Release 2.0 Concepts, Conversion & Crosswalk* training, Implementation Managers will **validate TAO caseloads.** Implementation Managers will ensure that a caseload has been converted to BEACON Release 2.0 for every AU Manager in the TAO.

The Implementation Manager will open TAO Office Explorer and:

- compare the "Active by Program" View in the "Assistance Unit Lists" group and the "Pending Applications" View in the "Daily Priority Actions" group for each AU Manager to the *PACES FMCS Case Data* report or generate an ARTS query to verify that a caseload is present on BEACON Release 2.0;

  Note: Remember, when generating the ARTS report, use the same timeframe used for the converted data to ensure the same information is downloaded. Subsequent data conversions - about once each month - will update the data. You will be notified in advance of each subsequent data conversion.

- if a caseload is not present for an AU Manager,

  ✓ look up several specific case SSNs for the AU Manager on the Client List window to navigate to the Eligibility Explorer to determine:

    - the existence of the AU on BEACON;
    - the current status of the AU; and
    - the current AU Manager's caseload that the AU is listed on.

  ✓ report any caseload discrepancies to the BEACON Action Center using the *BEACON Action Center Report*. See the section on the BEACON Action Center and the section on Accessing BEACON Release 2.0 Pilot Forms for more information.

As TAO Supervisors and AU Managers receive training, the Implementation Manager will then be responsible for:

- receiving a report of all problems/issues from TAO Supervisors;
- reporting unduplicated problems/issues to the BEACON Action Center using the *BEACON Action Center Report*;
- recording a list of all the reported discrepancies and the steps taken to resolve them; and
- using the information provided by TAO Supervisors complete a *Summary of Conversion Activities Document* and e-mail it to Regional Directors.

Note: If the same problem/issue keeps being reported, track the number of times it has occurred. However, e-mail the actual problem/issue only once to the BEACON Action Center. The data regarding the frequency of the discrepancy will be used later.

BEACON Action Center

To report unduplicated discrepancies using the *BEACON Action Center Report*, the Implementation Manager will e-mail the BEACON Action Center.

To e-mail using the DTA e-mail system select Action Center, BEACON or to e-mail from the Internet use BEACON_Action Center@DTA.State.MA.US.

Accessing BEACON Release 2.0 Pilot Forms

To access the four BEACON Release 2.0 pilot forms referenced in this memo, TAO staff must access S:/BEACON 2 Pilot Forms and then select the appropriate file listed below:

* the *Caseload Validation* file for the *Validation of Caseload Document;*

* the *Conversion Validation* file for the *Conversion Validation Document;*

* the *Summary of Conversion Activities* file for the *Summary of Conversion Activities Document*; and/or

* the *Action Center* file for the *BEACON Action Center Report.*

Reminder: These files are read only. AU Managers must save the document under a new name. Since cc:Mail will only allow file names up to eight characters, rename the file so they can be opened.

Creating Screen Prints in WordPad

While going through the process of validating conversion information within caseloads and specific cases, TAO staff should use WordPad to capture copies of those windows where discrepancies are present, if necessary. Copies can be stored in a file created through WordPad. See Attachment B for detailed instruction on creating screen prints in WordPad.

Questions

If you have any questions, please have your Implementation Manager contact the BEACON Action Center with your question by e-mail.

The following is a list of types of data converted from each existing System to
BEACON Release 2.0:

FMCS Recipient Data

Address Location Type (from Group/Budget
Code)
Disability End Date (from Error Profile)
Domestic Violence (from Multi-address
    code)
EBT and Direct Deposit Indicators
Extension Requests
Grant Amounts including SSFSP
Next Reevaluation Dates
Shelter and Utility Expense amounts
SSFSP (NPA-only, noncitizens)

PACES FIW1 Income and Expenses Data

Child Support Z
FS Unearned (from Spec Inc 'F')
In-kind (from Inc/Kind)
Lump Sum (from Spec Inc'L')
Net Ed Loans (from Spec Inc 'F')
Resource (from SocSec/RR/Other)
Dependent Care Expenses (from Dep Care)
Medical Expenses (from Med Ded)
Medical Insurance (from Med Prem)
Monthly Child Support [Obligation]
Deduction (from Assets)
Vendor Payments

BEACON Release 1.0 Data

Address Data
Assessed Person Demographics
Assessed Person Status Data
Assistance Unit Status Data
Clock Data
Collections Data
ESP Data
Monthly Reporting Status
Sanctions
Security
Work Program Requirement Status

FMCS Dependent Data

Education Code
Health Insurance Provider
SSA Claim Number

FMCS Direct-Deposit-Z Data

FMCS (90-day) Check Data

PACES FIW2 Income Data

Child Support (from CO/CS/AL)
Deemed Earned and Unearned Income (DE,
DU for all cats)
Deemor IRS Dependent Number (from
    IRSD)
Dependent Earnings Disregard Counter
    (from Dep Earnings)
Earned Lump Sum (LE for all cats)
FEP Wages (F1, F2 for TAFDC)
FS Attributed (FS for PA cats)
FS Earned (FE for PA cats)
In-kind Earned (IE for PA cats)
Other Unearned (OU for all cats)
Regular Wages (E1 ... E3 for all cats)
Roomer, Boarder, Renter (RM, BD, RT for
    all cats)
Self-employed (S1, S2 for all cats)
30 1/3 Disregard Counter

PRISM Data

Citizenship/Alien Status
Family Cap Data
Federal 60-month Lifetime Clock prior to
    Production
Immunization
SSN Histories
State 24-month Clock Journal
DET UC Match History
DOR New Hire Match History
DOR Wage Match History
SVES SSN Match History
FS 36-month clock

Creating Screen Prints in WordPad

Following are some quick step-by-step instructions on how to access and use WordPad to create screen prints.

1. Click on the **Start** button.

2. Go to **Programs**, then to **Accessories**, then down to **WordPad**.

3. Minimize **WordPad.**

4. Access the window to be copied.

5. Press the **Print Screen** button on the keyboard.

6. Maximize WordPad.

7. Go to **Edit** on the menu bar, then click on **Paste**.

8. Once the window appears within the WordPad screen click on **File, Save As** from the menu bar.

9. Type a file name and select a drive/folder to save the screen print to. Multiple screen prints can be stored in one file.

These screen prints, once saved, can be sent as an attachment via cc: Mail to the TAO Supervisor, Implementation Manager or BEACON Action Center as needed. See the cc: Mail training package for details on how to create an attachment in cc: Mail.