Field Operations Memo 2001-16
March 19, 2001

To: **Transitional Assistance Office Staff**

From: **Joyce Sampson, Assistant Commissioner for Field Operations**

Re: **BEACON Release 2.0 Pilot Activities - Phase III**

Background

Field Operations Memos 2000-31 and 2000-31A explained that AU Managers, TAO Supervisors and Implementation Managers would perform a series of casework activities in BEACON Release 2.0 Pilot. These activities began on November 13, 2000.

Field Operations Memos 2001-7 and 2001-7A explained that AU Managers, TAO Supervisors and Implementation Managers would perform Phase II casework activities in BEACON Release 2.0 Pilot. These activities began on February 26, 2001 and were extended through March 23, 2001.

Purpose

The purpose of this memo is to provide procedures for the following BEACON Release 2.0 Pilot Activities - Phase III:

1) practice planning the workday activities in BEACON Release 2.0 Pilot to prepare for BEACON Release 2.0 Production;

2) continuing casework activities listed on the revised BEACON Pilot Activities Checklist in accordance with the changes described in this memo; and

3) reviewing BEACON-generated notices and calculations on BEACON Release 2.0 Pilot and BB options on Gateway.

AU Managers should spend minimum of eight hours per week performing these activities, which begin on March 26, 2001 and continue through April 27, 2001.

Planning the Workday

When BEACON Release 2.0 is in Production, Transitional Assistance Office Staff must know how to perform current job activities using BEACON and how it helps to successfully manage their workday. To become familiar with and understand BEACON as a tool to manage casework activities, Transitional Assistance Staff must practice accessing Views and determining what activities are required to be taken on these Views in BEACON Release 2.0 Pilot. Transitional Assistance Staff do not need to access all views or take the required action on them.

AU Manager

To prepare for BEACON Release 2.0 Production, AU Managers must become familiar with how they will plan their workday using BEACON. This planning will include using BEACON as a tool to key information, track timeframes for AU actions, schedule appointments, develop Employment Development Plans and monitor clients' progress toward self-sufficiency.

When BEACON Release 2.0 is in Production, BEACON must be accessed daily. Each day the AU Manager must log onto BEACON to check the Views and perform the work that needs to be done in conjunction with these Views. See *A User's Guide: Transitional Assistance Programs and BEACON*, Chapter II, Section A for more information. As stated above, during BEACON Release 2.0 Pilot, AU Managers must practice accessing Views and determining what activities are required to be taken on these Views. AU Managers do not need to access all views or take the required action on them.

TAO Supervisor

When BEACON Release 2.0 is in Production, TAO Supervisors must check their Views daily to monitor their AU Managers' caseload activities. This is particularly critical when an activity completed by the AU Manager must be authorized by the TAO Supervisor.

In addition, if an AU Manager is out of the office, the TAO Supervisor must determine what work needs to be completed to ensure the work is completed timely.

Continuing Activities Listed on BEACON Pilot Activities Checklist

As stated in Field Operations Memos 2001-7 and 2001-7A, if the AU Manager completed all activities listed in the memos, he or she was to continue completing practice activities listed on the BEACON Pilot Activities checklist. Activities normally performed through an interactive interview should have been completed by role-playing interactive interviews with another AU Manager, if possible.

Beginning March 26, 2001, AU Managers must continue practicing activities listed on the BEACON Pilot Activities Checklist.

Continuing Activities Listed on BEACON Pilot Activities Checklist (continued)

Reminder: Completing one casework activity on BEACON Release 2.0 Pilot might satisfy several items on the BEACON Pilot Activities Checklist. For example, the activity "Add a Noncitizen" would also satisfy "Add a Person."

If the AU Manager has completed all activities listed on the checklist, Implementation Managers and TAO Supervisors will decide which activities each specific AU Manager must continue to practice based on those activities that are applicable to the AU Manager's caseload. Implementation Managers and TAO Supervisors will select activities that the AU Manager is having the most difficulty completing and those activities that exercise new BEACON Release 2.0 functions (i.e., address validation, address match and merging a household. See *BEACON Today* Issue 17 for more information. Procedures on address validation, address match and merging a household will be issued separately).

Activities listed on the BEACON Pilot Activities Checklist should be completed by role-playing interactive interviews with other AU Managers, when appropriate.

Note: Role-playing casework activities count toward the eight-hour requirement for each AU Manager. If AU Managers cannot meet the minimum eight-hour requirement, the Implementation Manager must contact the Regional Director.

Changes to the Checklists

The following changes have been made to the AU Managers' and the TAO Supervisors' checklists to simplify the reporting of AU activities.

• The AU Managers' checklists have been consolidated into one checklist. This consolidation eliminates the Step I, II and III sequence. Address validation/match and merging a household have been added as activities to be completed on the checklist. Also, the BEACON Release 2.0 Pilot Monthly Reporting activities have been clarified.

BEACON Release 2.0 Pilot Monthly Reporting AU activities must be performed on different Monthly Reporting AUs to ensure the proper outcome. If an AU Manager does not have enough Monthly Reporting AUs to complete the Monthly Reporting activities, he or she must take any TAFDC AUs and make it subject to Monthly Reporting on BEACON Release 2.0 Pilot. This activity must be completed by the date below which corresponds to the last digit of the AU's SSN. This will ensure that these AUs will be subject to Pilot Monthly Reporting during the month of April.

Continuing Activities Listed on BEACON Pilot Activities Checklist (continued)

Last Digit of AU's SSN	Last Date to Make AU Subject to Monthly Reporting for April
0	March 28, 2001
1	March 28, 2001
2	March 30, 2001
3	April 2, 2001
4	April 4, 2001
5	April 4, 2001
6	April 5, 2001
7	April 6, 2001
8	April 10, 2001
9	April 10, 2001

Note: Some activities related to Monthly Reporting AU diversions or terminations cannot be completed for March and April because of the special Monthly Reporting process described in Field Operations Memo 2001-7. However, if the March Conversion is the last one prior to the final conversion for BEACON Release 2.0 Production, then Monthly Reporting AU diversions/terminations will occur in May.

* The TAO Supervisors' checklists have been changed to list the casework activities by program. The TAO Supervisor must use the following four checklists:

  * The All Programs checklist is used to compile information for an AU Manager responsible for TAFDC, EAEDC and Food Stamp AUs.

  * The TAFDC checklist is used for an AU Manager responsible for TAFDC and Food Stamp AUs.

  * The EAEDC checklist is used for an AU Manager responsible for EAEDC and Food Stamp AUs.

  * The Food Stamp checklist is used for an AU Manager responsible for Food-Stamp-only AUs.

The TAO Supervisor will use the appropriate checklist to record the activities "complete," "not started" or "started" for each AU Manager.

For Example: A TAO Supervisor is responsible for five AU Managers. Two AU Managers handle EAEDC and PA FS AUs, two handle TAFDC and PA FS AUs and one handles TAFDC, EAEDC and PA FS AUs. The TAO Supervisor would use three separate checklists (TAFDC checklist, EAEDC checklist and the All Programs checklist) to report the status of casework activities for his or her unit.

Continuing Activities Listed on BEACON Pilot Activities Checklist (continued)

A row at the bottom of each checklist has been added and, if completed online, will automatically provide the percentage of activities completed for each AU Manager.

Note: Implementation Managers will use this information to report the percentage of casework activity completed for AU Managers on the *BEACON Activities Report*. This report was issued in an e-mail from Joyce Sampson to Directors on Wednesday, January 31, 2001. The *BEACON Activities Report* replaces the *TAO Summary* form referenced in Field Operations Memo 2000-31A.

The revised AU Manager Checklist and the four TAO Supervisors' checklists will be available on the S-drive under BEACON 2 Pilot Forms and will replace the existing AU Managers' and TAO Supervisors' checklists.

Reviewing Notices, Calculations and BB Options

After the appropriate level of authorization is completed in BEACON Release 2.0 Pilot for any casework activity, AU Managers must:

- check the notices on the Document History tab on the day after the request receives the final authorization to ensure the proper notice has been generated for the specific activity, if applicable;

- access the BB options in Gateway to verify that BEACON Release 2.0 Pilot transactions have made it to FMCS properly. The BB option will replace the WB option on the mainframe. The master file inquiry is under INQB, the case data inquiry is under RECB and the recipient data inquiry is under DEPB. For more information on BB options see *BEACON Today*, Issue 13;

    Note: Many of the casework activities are dependent on batch jobs running successfully. If the batch job was not successfully run, the activity will not be complete. TAOs are notified daily by an MIS Customer Service Bulletin when a batch job does not run, and detailed information is included in the BEACON Help Screens under BEACON Batch Jobs.

- review the information the day after the request is released to FMCS to determine the benefit amount for the most recent EBC on the **Financial tab** on the EBC Results window. The information listed includes Standard Amount, Asset, Gross Income, Deductions, Net Income, Benefit, Grant Amount and Notices; and

Reviewing Notices, Calculations and BB Options (continued)

Note: The calculation for a Request that has been authorized and is pending release will be listed on the Financial tab of the Interview Wrap-up EBC Results window. Once it has been released, the EBC results will be available for viewing through the Results tab on Eligibility Explorer.

- call in any issues/problems to the Customer Service Center in accordance with instructions in Field Operations Memo 2001-17.

TAO Supervisors' Responsibilities

TAO Supervisors remain the primary BEACON coach to their unit staff and must monitor each AU Manager's pilot activities. TAO Supervisors must review all BEACON Release 2.0 Pilot related activities.

The TAO Supervisor must:

- monitor the AU Manager's caseload activities on BEACON Release 2.0 Pilot;

- review and authorize (approve or reject) the casework activities on BEACON Release 2.0 Pilot;

  Note: When authorizing an action (adding a dependent, changing an address, etc.) on BEACON Release 2.0 Pilot, TAO Supervisors must look at the Verification tab to view any other outstanding verifications. If any verification for a specific action is outstanding, those data will not be available to be selected on the Interview Wrap-up window.

- if an AU Manager completes all activities listed on the BEACON Pilot Activities Checklist, work with the Implementation Manager to assign the AU Manager specific casework activities to complete from the checklist based on areas with which the AU Manager is having the most difficulty;

- complete the revised Supervisors' checklists described in this memo and forward them to the Implementation Manager; and

- call in any issues/problems to the Customer Service Center in accordance with instructions in Field Operations Memo 2001-17.

Implementation Managers' Responsibilities

The Implementation Manager must:

- **set up a schedule in the TAO to ensure that every AU Manager is spending at least eight hours per week performing the activities outlined in this memo;**

- review and authorize (approve or reject), if applicable, casework activities on BEACON;

- if an AU Manager completes all activities listed on the BEACON Pilot Activities Checklist, work with the TAO Supervisor to assign the AU Manager specific casework activities to complete from the checklist based on areas with which the AU Manager is having the most difficulty;

- continue reporting completed casework activities using the *BEACON Activities Report* issued in an e-mail from Joyce Sampson on January 31, 2001; and

- call in any issues/problems to the Customer Service Center in accordance with instructions in Field Operations Memo 2001-17.

Questions

If you have any questions, please have your Implementation Manager call the Customer Service Center with your question.