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Field Operations Memo 2001-21
April 18, 2001

To: Transitional Assistance Office Staff

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

Re: BEACON Release 2.0 Pilot Activities - Phase IV

Introduction

Field Operations Memos 2000-31, 2000-31A, 2001-7, 2001-7A and 2001-16 explained that AU Managers, TAO Supervisors and Implementation Managers would perform Phase I, II and III activities in BEACON Release 2.0 Pilot. These activities initially began on November 13, 2000 and continue through April 27, 2001. Phase IV activities begin on April 30, 2001 and continue through June 14, 2001.

These four phases of BEACON Release 2.0 Pilot activities were developed to prepare TAO Staff to learn BEACON and provide a comfort level for users when BEACON Release 2.0 is in production.

Purpose

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

- 1) continuing BEACON Pilot Activities in accordance with instructions in 2001-16; and
- 2) performing interactive interviews.

AU Managers should spend a minimum of eight hours per week performing these activities.

These activities will overlap with Pre-Conversion activities which begin on May 14, 2001 and continue through June 14, 2001. A separate Field Operations Memo will be issued providing Pre-Conversion activities.

**Continuing
BEACON Release
2.0 Pilot Activities
Phase III**

Beginning April 30, 2001, AU Managers must continue performing activities listed in Field Operations Memo 2001-16. These activities include:

- practicing Planning the Workday;
- completing activities on the BEACON Pilot Activities Checklist; and
- reviewing BEACON-generated notices and calculations on BEACON Release 2.0 Pilot and BB options on Gateway.

Reminder: If the AU Manager has completed all activities listed on the BEACON Pilot Activities Checklist, Implementation Managers and TAO Supervisors will decide which activities the AU Manager must continue to practice based on those applicable to the AU Manager's caseload. Implementation Managers and TAO Supervisors will continue selecting activities that the AU Manager is having the most difficulty completing such as Monthly Reporting activities, address validation, address matching and household merging.

**Application for
Transitional
Assistance
Benefits
(TABA-1G)**

The *Application for Transitional Assistance Benefits* (TABA-1G) will be used during BEACON Release 2.0 Pilot Phase IV activities when completing interactive interviews. This form was initially created to use when BEACON Release 2.0 is in Production. To practice and be familiar with it, however, AU Managers will use a special grayed-out version of it for interactive interviews during BEACON Release 2.0 Pilot Phase IV. The reason for graying-out certain areas of the form is explained in the following interactive interview section.

The form was developed to mirror the flow of BEACON windows. In certain instances, though, the form deviates from the order of the workflow so that information such as client's name does not have to be completed continuously.

When BEACON Release 2.0 is in production, the *Application for Transitional Assistance Benefits* will be used in rare instances, for example, if BEACON is unavailable due to power outages or other unforeseen circumstances. Other than these rare circumstances all applications, reapplications and reevaluations will be directly entered on BEACON Release 2.0 during an interactive interview.

**Interactive
Interviews***Definition*

AU Managers will begin conducting interactive interviews for applications, reapplications and reevaluations. An interactive interview means that the AU Manager will interview the applicant/recipient face-to-face while entering the responses given by the applicant/recipient onto BEACON Release 2.0 Pilot.

The interactive interview activities count toward the eight-hour requirement for each AU Manager. Once the weekly eight-hour minimum requirement is met, the remaining scheduled applications, reapplications and reevaluations for the week do not have to be completed by an interactive interview.

*Gathering
Applicant/
Recipient
Information*

To complete the interactive interview and record all responses from the applicant/recipient the AU Manager must:

- explain to applicants/recipients that they are participating in a pilot activity involving the introduction of a new system;
 - enter application, reapplication and reevaluation responses from the applicant/recipient onto BEACON Release 2.0 Pilot. For information on completing applications, reapplications and reevaluations in BEACON refer to *A User's Guide: Transitional Assistance Programs and BEACON*; Chapter IV, Sections A, B and C;
 - print the BEACON-generated Request for Assistance (RFA) and application form or the reevaluation form;
 - **have the applicant/recipient sign the BEACON-generated RFA and application form or the reevaluation form;**
 - go to the Verification Tab to generate a list of needed verifications, if any, and give a copy to the applicant/recipient and keep a copy for the AU record;
 - complete all paper forms other than the current application (RA-1, CMA-1, EAEDC-2, FSP-1), application supplement (TAFDC-App/Supp), reapplication and reevaluation (EAEDC-9, TER-TAFDC). **The recipient must sign all forms that require his or her signature;**
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**Interactive
Interviews
(continued)**

- complete the new *Application for Transitional Assistance Benefits* for all TAFDC, EAEDC, Food Stamp and EA applications, reapplications and reevaluations, if applicable, because information will be erased after the final conversion. Some areas on this form have been grayed out and do not need to be completed.

Exception: If someone in the household is a Basic Person, the information must be captured in the Household/AU Members section of the *Application for Transitional Assistance Benefits*.

Certain areas were grayed out because the information has already been captured in the following places:

- information that will be converted from the legacy systems;
- information printed on the BEACON-generated application or reevaluation forms;
- information already gathered by completing the existing paper forms such as Child Support information captured on the CA/CS, teen parent referral information captured on the (DSS-Teen/Ref), etc.

Note: The applicant/recipient does not need to sign this paper form because they are signing the BEACON-generated application and reevaluation forms.

**Entering
Information
on Legacy
Systems**

In addition to completing all interactive interview activities listed above, the AU Manager must establish or update the AU on PACES, AU information in PRISM and ESP information in BEACON Release 1.0.

**Impact of
Final
Conversion**

The information entered during the interactive interview on BEACON Release 2.0 Pilot will be erased during final conversion. The information converted from legacy systems will be the only information that will appear in BEACON after the final conversion. It is imperative to capture all the information that will be erased during final conversion on paper so that an accurate record of information will be available to reenter when BEACON Release 2.0 is in production. This information will be available on the new *Application for Transitional Assistance Benefits* and on all existing paper forms completed during the interactive interview.

**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 AU 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.

- work with the Implementation Manager to assign the AU Manager specific AU activities to complete from the checklist based on areas with which the AU Manager, after completing all activities on the BEACON Pilot Activities Checklist, is having the most difficulty;
 - complete the appropriate Supervisors' BEACON Pilot Activities Checklists and forward them to the Implementation Manager;
 - ensure that AU Managers are completing interactive interviews; and
 - forward any issues/problems to the Implementation Manager who will forward them to the Customer Service Center in accordance with instructions in Field Operations Memo 2001-17.
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**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, AU activities on BEACON;
- work with the TAO Supervisor to assign the AU Manager specific AU activities to complete from the checklist based on areas with which the AU Manager, after completing all activities on the BEACON Pilot Activities Checklist, is having the most difficulty;
- continue reporting completed AU activities using the *BEACON Activities Report* issued in an e-mail from Joyce Sampson on January 30, 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 Systems-related questions, please have your Implementation Manager call the Customer Service Center with your question.

If you have any policy-related questions, have your hotline designee call the policy hotline at 617-348-8478.
