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From the Commissioner

Dear Colleagues:

As you know, in October, Governor Patrick announced \$352 million in budget reductions in order to close a \$600 million gap. As part of these reductions, we were prepared to begin counting the income of Supplemental Security Income (SSI) recipients toward determining eligibility and grant levels for the Transitional Aid to Families with Dependent Children Program (TAFDC). This reduction would have stopped or significantly reduced TAFDC benefits for thousands of families.

I am thrilled to announce that after careful review of the most recent revenue figures, Governor Patrick has reversed this 9C reduction. The restoration will preserve full cash assistance benefits for 8,550 families with SSI income. These decisions reflect Governor Patrick’s ongoing commitment to preserving safety net services and supports for the state’s residents with the greatest needs, and I am grateful to him for preserving critical benefits for families with disabilities.

In addition, Governor Patrick has reversed the increased work participation requirement for TAFDC families whose youngest child is between the ages of six and eight.

This change was slated to take effect on February 1, 2010, and would have increased the work participation requirement for these families from 24 hours per week to 30 hours per week. This change has now been canceled. Soon, you will receive a Field Operations Memo regarding this decision, and a notice will be sent to affected clients as soon as possible.

It has not gone unnoticed that many of you have worked hard to plan for the implementation of these reductions, and I know the past several months have been difficult. The time, effort, and resources you have given were not for naught: we anticipate the Department will face reductions in the Fiscal Year 2011 budget and while we do not know what this may entail, we now have a comprehensive strategy for communication and implementation. Thankfully, in this case, we did not need to follow through with our plans and the best possible results have been realized.

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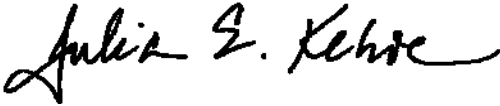
From the Commissioner *(Continued from page 1)*

Our other previously announced reductions have already taken place. These include \$2 million in reductions to the Employment Services Program; administrative reductions through management furloughs and layoffs; and the elimination of nearly \$5 million in state surpluses and bonus awards.

As always, I appreciate your patience during this difficult time.

Thank you for all of your efforts to assist the low-income individuals and families of Massachusetts.

With much appreciation,



Julia E. Kehoe
Commissioner

Quality Corner

This month, we will discuss an error in a Non Public Assistance (NPA) case related to the shelter deduction. The error was caused by a BEACON Interview Wrap-up failure that resulted in a shelter expense change not being processed.

BEACON Interview Wrap-up Shelter Expense Change

The case consisted of a 42-year-old disabled woman living alone. The household was certified for one year from September 1, 2008 through August 31, 2009. At the time of certification, the client was homeless, so the homeless shelter deduction was used in the SNAP benefit calculation. Based on SSI income of \$704 per month, the client received a SNAP amount of \$74 per month.

The case record indicated that on June 17, 2009, the client reported that she had found an apartment and was paying rent in the amount of

\$145 per week. On June 23, 2009, the case manager entered the new rental information in BEACON but did not create an EBC transaction for Wrap-up. Consequently, the original shelter information in this case the homeless shelter deduction continued to be used in the SNAP benefit calculation, causing an underissuance of \$62 in the review month.

What's a Case Manager to Do?

Although Interview Wrap-up is a commonly used window in BEACON processing, many errors are caused by a failure to complete the Interview Wrap-up process. Case managers must be careful to complete Interview Wrap-up because failure to complete this window means the transaction will not be processed, and BEACON will be unable to effect the necessary change(s). See *A User's Guide: Transitional Assistance Programs and BEACON*, Chapter XVII, Interview Wrap-up, for details.

From the Forms File

Revised Forms

Child Care Fact Sheet

25-642-1209-05

25-643-1209-05(S)

CCFS (Rev. 12/2009)

The *Child Care Fact Sheet* has been revised. Refer to Field Operations Memo 2009-70 for more information.

SNAP Employment and Training Referral

09-052-1209-05

SNAP/E&T-2 (Rev. 12/2009)

This form has been revised to reflect the name change of the Food Stamp Program to the

Supplemental Nutrition Assistance Program (SNAP). This form is available in the *Online Forms* section of DTA Online.

Revised Brochure

Earned Income Tax Credit

25-650-1209-05

25-651-1209-05(S)

EITC-B (Rev. 12/2009)

The *Earned Income Tax Credit* brochure has been revised. Refer to Field Operations Memo 2009-70 for more information on the use of this brochure. Please discard old versions of this brochure and use the revised version.

From the Hotline Index

A “From the Hotline” index of the questions and answers published in *Transitions* during 2009 has been compiled below. The index is intended to provide quick access to policy and procedural information. Please remember that this index explains policy and procedure as of the month and year in which the question and answer were issued.

Emergency Aid to the Elderly, Disabled and Children		
Topic	Month	Related Procedure/Policy, 106 CMR:
Competent Medical Authority	June	701.600(H), Field Operations Memo 2009-6
Disabled	June	320.200
Income: American Recovery and Reinvestment Act	August	Field Operations Memo 2009-18
Intentional Program Violation	October	706.300
Limitation on Program Eligibility: Probation	April	701.110
Noncitizen	December	320.620
Unearned Income	August	321.210(B)
Supplemental Nutrition Assistance Program		
Topic	Month	Related Procedure/Policy, 106 CMR:
Assets: Lump Sum Payments	August	363.130(D)
Assets: Noncountable, Vehicle	November	363.140(D)
Categorical Eligibility	May	365.180, Field Operations Memo 2008-27
Categorical Eligibility	November	365.180
Child Support Deduction	March	364.400(E)
Definitions: Means-Tested Programs	October	360.030(G)
Dependent Care Deduction	February	364.400(D)
Disabled Noncitizen, EAEDC Recipient	December	Field Operations Memo 2008-11
Elderly or Disabled	December	361.210

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**From the Hotline: Index** *(Continued from page 4)*

Supplemental Nutrition Assistance Program (continued)		
Topic	Month	Related Procedure/Policy, 106 CMR:
Elderly Noncitizen, EAEDC Recipient	December	Field Operations Memo 2008-28
Failure to Comply with Another Assistance Program's Requirements	October	363.220
Gross Monthly Categorical Eligibility Income Standards	May	364.976
Income: American Recovery and Reinvestment Act	August	Field Operations Memo 2009-18
Income: Summer Earnings	July	Field Operations Memo 2009-27
Income: Unearned, Alimony	March	363.220
Income: Unearned, Unemployment Compensation	August	363.220, Field Operations Memo 2009-18
Nonhousehold Members: Students	July	361.230
Students	July	362.410
Students: Continuous Enrollment	July	362.420
Verifications: Child Support Payments	March	361.610(J)
Verification of Income	May	361.650, 361.920, 363.210(G)

Transitional Aid to Families with Dependent Children		
Topic	Month	Related Procedure/Policy, 106 CMR:
Assets: Countable	November	204.120
Assets: Inaccessible	November	204.125
Competent Medical Authority	June	701.600(H), Field Operations Memo 2009-6
Dependent Child	July	203.575
Disabled	June	203.530
Domestic Violence: Good Cause Waivers	October	203.110

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**From the Hotline: Index** *(Continued from page 5)*

Transitional Aid to Families with Dependent Children (continued)		
Topic	Month	Related Procedure/Policy, 106 CMR:
Domestic Violence: Good Cause Waiver Verification	November	203.110
Employment Services Program (ESP): Education	September	207.140, Field Operations Memo 2005-23
ESP Support Services: Child Care	February	207.210
Exemptions	October	203.100
Good Cause Criteria	September	701.380
Income: American Recovery and Reinvestment Act	August	Field Operations Memo 2009-18
Income: Lump Sum	August	204.240
Income: Summer Earnings	July	204.250(RR)
Income: Unearned, Unemployment Compensation	August	204.210(B)
Intentional Program Violation	October	706.300
Limitation on Program Eligibility, Controlled Substances	October	701.110(D)
Limitation on Program Eligibility: Probation	April	701.110
Work Program	February	203.400
Work Program: Education and Training	September	203.400

Cultural Communication

Each month, the Diversity Council will offer tips about communicating to people of different cultures.

This month's tip:

In Russian culture, it is considered to be gravely disrespectful to show the soles of one's shoes to others.

Field Operations Memos

Work Program Requirement Expansion

TAFDC

Field Operations Memo 2009-65 A

Effective February 1, 2010, a client whose youngest child in the case is mandatory full-time school age or older will be required to meet the Work Program requirement for **30 hours per week**. This includes a client whose youngest child would be in the case but is ineligible because the child receives Supplemental Security Income (SSI), foster care maintenance payments, adoption assistance or is subject to the Family Cap provisions (see 106 CMR 204.305(E)(1), (2), (3) or (7)). Currently this client must meet the Work Program requirement for 24 hours per week.

This memo informs case managers about an informational mailing to all nonexempt clients whose youngest child is between the ages of mandatory full-time school age and nine years old. Due to a delay in implementation, the notices were mailed on December 28, 2009 telling clients of the new date (February 1, 2010) for the new Work Program requirement change.

This change was cancelled on January 11. Clients impacted by this change will be notified of the cancellation.

SNAP Program Access Review

SNAP

Field Operations Memo 2009-67

To ensure program access, USDA conducts a yearly nationwide review of selected state offices that provide SNAP benefits. The purpose of this review is to evaluate customer service in TAOs and to identify and eliminate barriers to participation.

The purpose of this memo is to describe the results of this review so all TAO staff can benefit from USDA's observations and findings.

Community Service Site Clean-up Project

TAFDC

Field Operations Memo 2009-68

In September 2009, a report was generated from BEACON identifying all Community Service Sites that had been inactive for the previous 12 months. Local Office Quality Control (LOQC) reviewed the report and found that the majority of the sites listed had no contact information or had information that was outdated.

This memo:

- explains the contact method LOQC used to reach the community service sites; and
- details follow-up action by Central Office staff for updating these community service sites.



Field Operations Memos

ESP Transportation Changes

TAFDC

Field Operations Memo 2009-69

This memo advises TAO staff about changes to the transportation benefit for ESP clients. The referral process to TransAction Associates for transportation payments ended December 31, 2009. **Effective January 1, 2010**, a client or former client whose **only** activity is employment is no longer eligible to receive transportation payments. Clients who are employed **and** are participating in an ESP activity remain eligible for transportation payments.

Earned Income Tax Credit (EITC), Massachusetts Earned Income Credit (EIC) and Child Care Assistance Annual Mailing

All

Field Operations Memo 2009-70

In January 2010, the Department will issue the annual informational mailing about federal Earned Income Tax Credit (EITC), Massachusetts Earned Income Credit (EIC) and child care assistance. The mailing will be sent to all active TAFDC clients, all former TAFDC clients, all former TAFDC clients whose cases closed on or after January 1, 2009, and all active SNAP households, excluding SNAP households in the Malden Centralized SSI Office and SNAP households receiving TAFDC.

TAOs received EITC posters in English and Spanish in mid-December. The posters must be displayed in TAO waiting areas year-round to encourage clients to ask about the benefits of EITC.

Diversity Quote

“We have become not a melting pot but a beautiful mosaic. Different people, different beliefs, different yearnings, different hopes, different dreams.”

Jimmy Carter

FYIs

Assignment of Support T- A34/36 Form

In a recent Local Office Quality Control (LOQC) review, it was found that some TAFDC cases did not have a properly completed *Assignment of Support* (T-A34/36) form. Case managers are reminded to fill out all portions of this form (including the absent parent's name). Additionally, the form must be signed and dated by the applicant/client in the appropriate section(s).

Completing this form is an essential first step in locating an absent parent, establishing paternity and obtaining child support.

Getting Ready for BEACON 3

Development of BEACON 3.0 is ongoing. This column will continue to appear in future *Transitions* so that you will be up-to-date on significant project milestones.

User Acceptance Testing (UAT) for BEACON 3.0 began and is expected to last a total of eight weeks. This month's column addresses our current time-line for preparations and BEACON 3.0 implementation.

UAT: Phase I

Phase I of UAT is ongoing and consists of 12 testers selected from TAO staff. It is being conducted over a two-week period.

UAT: Phase II

Phase II of UAT will begin early next month and will include approximately 70 additional testers selected from each TAO as well as from Central Office staff. At the end of this additional two-week period, a decision regarding the BEACON 3.0 "go live" date will be finalized.

BEACON 3.0 Implementation

Scheduled live production of BEACON 3.0 will begin soon after the Phase II testing is complete. To prepare for this transition, be sure to keep up with the latest BEACON Flashes.

BEACON 3.0 Flash #4 is now available in the PACE system. (Log into PACE from our Training Unit's Web page select "Conference and Media Center," and then choose "Audio & Video Presentations.") Flash #4 provides an overview of the Verification Checklist functionality, the new Verification-on-the-fly component and the Interview Wrap up functionality.

FYIs

Reminder about the EAEDC- AP-SSI-I Reimbursement Requirement

Case managers are reminded that current procedures require EAEDC applicants and clients who are disabled or age 65 or older and awaiting determination of SSI benefits to complete and sign the *Authorization for Interim Assistance Reimbursement (Initial SSI) (AP-SSI-I)* or the *Authorization for Interim Assistance Reimbursement (Reinstated SSI) (AP-SSI-IA)* used when the applicant or client is appealing the termination or suspension of SSI benefits. The case manager must record the receipt of the signed form on the BEACON Disability window on the SSI Tracking Tab and file the original form in the case record.

See *A User's Guide: Transitional Assistance Programs and BEACON* Chapter XIII, Section H, pages 21-22.

Verifying Medical Deductions in SNAP

Many elderly and/or disabled SNAP clients have difficulty obtaining verification of medical expenses, for a variety of reasons. Additionally, due to privacy issues, it may be impossible for a case manager or authorized representative to assist a client in obtaining medical expense verifications.

Case managers must remember to request only sufficient verification to allow the medical expense, and must be careful not to burden the client or violate the client's privacy by requesting unnecessary verifications. For example, if a client submits receipts for prescriptions purchased in a given month, it is not necessary that the client also submit a printout from the pharmacy showing all of the client's prescriptions for the past year. If there is a question as to whether the prescription amounts are for a particular month or for a longer period of time, the case manager can request a statement from the client to determine the correct amount of the medical deduction.

Case managers are also reminded that a self-declaration related to a medical expense may be an acceptable alternative to physical documentation. For example, if a client presents receipts for over-the-counter items purchased such as antacids, pain relievers, or adult diapers, it is not required that the client also obtain a letter from a medical practitioner stating that the eligible over-the-counter items have been prescribed or recommended. A self-declaration from the client that these items are purchased monthly as recommended by the medical practitioner is sufficient, unless the client's statement is questionable.

SNAP policy related to questionable information can be found at 106 CMR 361.620. Additional information about the medical expense deduction can be found at 106 CMR 364.400(C), 364.450(A), 366.320(C)(3), and the "SNAP Medical Deductions Job Aid" available in Policy Online.

TAO Meeting Notes