



Transitions

March 2010

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From the Commissioner

Dear Colleagues,

As several managers are moving on to retirement and other opportunities, we wish them the best of luck for a happy, healthy, and prosperous future. To ensure effective management and day-to-day support of our local offices, several redeployments to the field are underway.

Our overall strategy is for the larger local offices in each region to serve as “hubs” that work in tandem with smaller offices. This regional approach will ensure cross-TAO consistency, and will allow managers to cover each other’s offices should the need arise.

In Boston and Springfield, where we have two offices in the same city, I understand the preference of staff is ultimately to develop one large office. We will continue to work with EOHHS to align the respective office leases so that when they expire, we can put out bids for one large office in each city. We still may not be able to obtain space large enough to accommodate everyone, but we will attempt to look for it. In the meantime, using flexible assignment of field managers, we will begin to operate the offices in a more consistent and integrated way. Conceptually, the offices in those cities will be parts of a whole – as though they were a single office with two physical locations. This framework is an important model for standardizing program operations and improving the way we do business. Please note, however, that in terms of staffing levels, work location assignments and other operational matters, the offices in each city are still distinct locations.

Western Region

For some time, Nancy Dwyer has done a fantastic job with managing both Springfield State and Springfield Liberty. I am happy to report that Claudette Champagne has been promoted from Assistant Director to Director of **Springfield Liberty**, and Melissa Pietraszkiwicz has been promoted from BERS C to Assistant Director of Springfield Liberty. Congratulations to you both! Nancy Dwyer remains the Director of **Springfield State**.

To provide additional support in Worcester, Peter Sasso will leave his post as Director of Administrative Operations at Central Office to become Director of Customer Service and Community Relations in **Worcester** and the central

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From the Commissioner (Continued from page 1)

Massachusetts region. He will focus on customer service delivery and coordinating and developing relationships with community-based organizations and partners, state agencies and stakeholders to provide additional services and resources to our clients.

Northern Region

MaryJo McEvoy has retired as Director of **Lawrence**. Please join me in thanking her for her many years of service to DTA. I am pleased to report that Brian Mulholland has been promoted from Assistant Director at North Shore to Director of Lawrence. Congratulations, Brian!

Anne Louise Glynn has moved from Assistant Director at Malden to Assistant Director at **North Shore**.

Eastern Region

As I mentioned earlier, in Boston we are working to implement consistent practices across the **Newmarket Square** and **Dudley Square** TAOs. To better facilitate this effort, we have restructured management responsibilities in Boston. Agnes Cunio is now the Boston Cash Program Director; Mary Flanigan is now the Boston SNAP Director; and Felix Arroyo is now the Boston Customer Service and Community Relations Director. Like Peter Sasso in Worcester, Felix will be tasked with coordinating and developing relationships with community-based organizations and partners, state agencies and stakeholders to provide additional services and resources to our clients in greater Boston. I am confident that all three will bring their considerable expertise to these roles, and I congratulate Mary Flanigan on her promotion. These management changes will not impact current reporting relationships for case managers or supervisors.

For additional support, both Dudley and Newmarket will each have four Assistant Directors.

In Dudley, the Assistant Directors are Suzanne Gaskin (formerly an Assistant Director in Malden), Anne Lehane, John O'Neil (formerly the Acting Director of Framingham), and Cora Stewart-Forte.

In Newmarket, the Assistant Directors are Elizabeth Czolpinski and Richard Fratus. We anticipate two additional Assistant Directors will be announced soon.

Martine Altine has moved from Assistant Director at Dudley Square to Assistant Director at **Revere**. Anne O'Sullivan has been promoted from Business Process Redesign Manager at Central Office to Acting Assistant Director at **Malden**. In addition, Karen Delmonico has been promoted from BERS C to Acting Assistant Director at Malden. Congratulations, Anne and Karen!

Margaret "Peg" Nogueira, Assistant Director in Milford, has been promoted to the Acting Director of **Framingham**. Congratulations, Peg!

Southern Region

As many of you may know, Marissa Cutts left DTA to pursue other opportunities. The new Director of **Brockton** is Al Dufresne (formerly the Director of the Taunton TAO). Darlene Hines has moved from Assistant Director in Brockton to Director of the Centralized Eligibility and Processing (CEP) Unit in Central Office. Sandra Pellicane, the previous CEP Director, is now an Assistant Director in Brockton.

From the Commissioner (Continued from page 2)

Virginia “Ginny” Donovan, formerly an Assistant Director in **Taunton**, will now be an Assistant Director in Brockton.

John Fraga, formerly an Assistant Director in New Bedford, has been promoted to the Acting Director of Taunton. Congratulations, John!

Central Office

Last month, Tom Noonan retired as General Counsel. We thank him for his many decades of service to the Department. I am pleased to announce that Koren Christensen has been promoted from First Deputy General Counsel to Acting General Counsel.

Ezra Sykes, Director of Project Management, left the Department at the end of 2009 to pursue other opportunities. April Myers, formerly a Vendor Analyst in CAFE, is the new Director of Project Management.

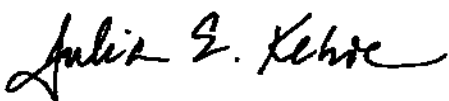
Congratulations to Koren and April!

I thank all of our managers for their patience and understanding, and I look forward to visiting you in your new locations. I’m sure your new co-workers are making you feel welcome. The TAO manager telephone list is being updated and will be distributed as soon as possible.

To further support the Field, I am excited to report that Massachusetts will receive approximately \$9 million to administer SNAP through a federal Department of Defense appropriation bill. The purpose of this federal funding is to provide additional resources to address the dramatic increase in SNAP participation. These funds will allow our colleagues who were hired with American Reinvestment and Recovery Act (ARRA) funds to become permanent employees. In addition, we are in the process of hiring BERS A/B staff members and will post clerk positions soon. We are committed to hiring as many people as we can to bring relief to our local offices. Ultimately, the number of staff that we will be able to hire is dependent upon adequate funding through the ongoing FY11 state budget process.

As always, thank you for your patience and your commitment to serving low-income individuals and families across the Commonwealth.

With much appreciation,



Julia E. Kehoe
Commissioner

Quality Corner

This month, we will discuss an error that resulted from the dual effect of unreported earnings and an incorrect certification type.

Unreported Earnings/Incorrect Reporting Type

The Non Public Assistance (NPA) SNAP household included a 29-year-old woman and her three children. She applied for SNAP benefits because of a recent loss of employment. The case was approved and certified as Recertification (regular change reporting) for six months. The client had no income so she was eligible for \$668 monthly in SNAP benefits. This is the maximum allotment for a household of four. The client was subsequently approved for and started receiving unemployment compensation (UC) benefits in the amount of \$1,122 per month. She did not report the receipt of UC benefits to her case manager. The unreported UC benefits together with the assignment of an incorrect certification type caused an overpayment error of \$251 for the review month.

What's a Case Manager to Do?

Since the client had a history of earnings, the case should have been certified as Universal Semiannual Reporting (USR). This would have prevented the error. USR households are only required to report a change when the household's income rises above the Maximum Gross Monthly Income Standards at 106 CMR 364.950 and 106 CMR 364.976 or when a person with income is added to the household, which causes the household's income to rise above the Maximum Gross Monthly Income Standards. For more information on USR, see 106 CMR 366.110(C).

Reminder: Although the use of Recertification was incorrect given the circumstances of the case discussed above, please remember that this certification type (i.e. Recertification) must be accompanied by a corresponding 12-month certification period. If the household contains all elderly or adult disabled members, this certification period must be increased to 24 months.

Diversity Quote

“We cling to our own point of view, as though everything depended on it. Yet our opinions have no permanence; like autumn and winter, they gradually pass away.”

Chuang Tzu

From the Hotline

If you have any questions on this column or other policy and procedural material, please have your Hotline designee call the **Policy Hotline at 617-348-8478**.

Q. My client applied for TAFDC today, February 3rd. She recently stopped working and received her last pay from work on January 27th. Do I count this earned income in determining her eligibility or grant amount?

A. No. If this client is not currently employed and has received her last pay before her application date, then do not count the income she received prior to the date of application in determining her eligibility or grant amount. Case managers must ask if the client will be receiving any additional pay (such as for vacation time or unused sick time). If the client is eligible to receive any of this additional income, the case manager must tell the client that the additional income must be accessed and the income must be counted. See 106 CMR 702.920 for more information on initial determination of eligibility and grant amount.

Q. A mother applying for SNAP benefits is married and employed part-time. Her husband is unemployed and has been for two years. Recently, the husband resumed his job search, and the couple is requesting a dependent care expense deduction. Even though the husband is job searching and is not currently working, can I deduct their dependent care expenses?

A. Yes. Their appropriate deductible expenses are the actual dependent care costs necessary for this husband and wife to accept or continue employment, comply with the SNAP Employment and Training Program (SNAP E&T) requirements or attend training or education in

preparation for employment. See 106 CMR 364.400(D) for more information on the dependent care deduction in SNAP. Also, remember that dependent care expenses are only verified prior to initial certification when questionable. See 106 CMR 364.450(B) for more information on verifying other deductible expenses.

Q. I took an application today from a woman applying for SNAP benefits. She reports being unemployed for almost two years and currently has no income. She has verified a shelter expense of \$850 per month. Should I request additional information and verification before approving her for SNAP benefits because she has expenses beyond her means?

A. If during the application interview your SNAP applicant indicates that she is not meeting her expenses, for example, she is behind on her rent or she has incurred credit card debt to pay her expenses, then the usual rules for verifying deductible expenses still apply. See 106 CMR 364.450 for more information on verifying deductible expenses at initial certification in SNAP. If the applicant is meeting her expenses with no apparent income, or there are other questionable details in the case, additional verification may be required.

NOTE: When TAFDC or EAEDC applicants with living expenses that exceed their income have not been meeting their expenses, no additional verifications are required, unless there are other questionable details regarding the case. See 106 CMR 701.410 for more information on verifications in the TAFDC and EAEDC programs.



From the Forms File

New Brochure

Volunteer to Succeed: DTA's Community Service Program Brochure

02-905-0210-05

VTS-Brochure (2/2010)

The *Volunteer to Succeed: DTA's Community Service Program* brochure designed to inform clients about the opportunities of the Volunteer to Succeed Program is now available on Policy Online. Refer to Field Operations Memo 2010-15 for more information.

New Form

Participating in Volunteer to Succeed: DTA's Community Service Program Flyer

02-900-0210-05

VTS-Flyer (2/2010)

The *Participating in Volunteer to Succeed: DTA's Community Service Program* flyer designed for community site recruitment is now available on Policy Online. Refer to Field Operations Memo 2010-15 for more information.

My Account Page (MAP) Flyer

My Account Page (MAP) Flyer

25-445-0210-05

MAP Flyer

My Account Page (MAP) marketing materials will be sent to each TAO in the coming weeks. The packet of information will include two copies of the MAP poster and 50 copies of the MAP flyer (both in English). TAO staff will be able to reorder the MAP flyer through the Document Production form ordering system, if needed.

Field Operations Memos

BEACON 3.0 User Acceptance Testing (UAT)

All

Field Operations Memo 2010-11A

The purpose of this Field Operations Memo is to provide TAO staff procedures for User Acceptance Testing in preparation for BEACON 3.0 Implementation. This memo obsoletes Field Operations Memo 2010-11.

Field Operations Memos

Updated Orientation PowerPoint Presentation as a Mandatory Application Activity

TAFDC

Field Operations Memo 2010-12

Field Operations Memo 2007-46 introduced TAO staff to the Orientation Sessions PowerPoint presentation as a mandatory application activity.

The purpose of Field Operations Memo 2010-12 is to tell TAO staff about the updated Orientation PowerPoint presentation as a mandatory application activity. The Orientation Session has been updated as follows:

- CIES component/activity names have been changed;
- Earned Income Tax Credit (EITC) and Massachusetts' Earned Income Credit (EIC) information has been updated; and
- descriptions of services impacted by the current fiscal crisis have been modified.

The revised Orientation Session became available on **February 16, 2010**.

Reminder: CIES Populations Best Served

TAFDC

Field Operations Memo 2010-14

Field Operations Memo 2009-45 advised TAO staff about:

- changes to ESP activities as a result of the CIES procurement process;
- which clients are best served by the new activities; and
- how to prioritize referrals to ESP activities as a result of the CIES procurement.

Field Operations Memo 2010-14 reminds TAO staff about the "Population Best Served" descriptions for clients enrolling in the CIES components/activities. The "Populations Best Served" descriptions should be used as *guidelines* when referring clients to the various CIES activities.



Field Operations Memos

Changes to the Community Service Program

TAFDC

Field Operations Memo 2010-15

Field Operations Memo 2009-14 advised TAO staff about the expansion of community service sites.

Field Operations Memo 2010-15 advises TAO staff about the following additional changes to the Community Service Program:

- the rebranding of the Community Service Program;
- the new role of the Employment Services Coordinator;
- the revised Community Service Agreement;
- new marketing materials for the rebranded Community Service Program;
- an outreach plan for TAOs to recruit community service sites; and
- community service site follow-up.

Random Moment Sampling E-mail Survey System

All

Field Operations Memo 2010-16

This Field Operations Memo reminds TAO staff about the Random Moment Sampling (RMS) e-mail process.

The memo also provides procedures to follow when a case manager who is no longer required to participate in RMS receives an RMS e-mail.

Changes to the Virtual Gateway Consumer and Provider Face Common Intake Applications

SNAP

Field Operations Memo 2010-17 (**On Hold**)

This memo informs TAO staff about the modifications made to the Virtual Gateway consumer and provider face applications for SNAP benefits in an effort to improve the successful completion of these Web applications. The memo also instructs case managers that, due to the removal of the expedited issuance questions, all applicants must be screened for expedited benefits during the SNAP interview.

Note: The implementation of the modifications to the Virtual Gateway consumer and provider face common intake applications has been delayed until sometime in March. TAO staff will be notified when these changes have been implemented.

State Letter

Clothing Allowance - TAFDC

TAFDC

State Letter 1357

This State Letter transmits a change in the TAFDC Eligibility, Need and Payment Standards regulations for the month of March 2010 and thereafter.

Beginning in 2010, the Department will be able to provide a nonrecurring clothing allowance or other one-time nonrecurring payment to eligible TAFDC clients, in the event such an allowance or payment is authorized in the budget, without an annual change in these regulations.

FYIs

Getting Ready for BEACON 3

Development of BEACON 3.0 is continuing. 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 is ongoing. Where issues are reported by testers, they continue to be researched and prioritized for resolution. Thank you to all those taking part in this important testing process. Your participation is very much appreciated.

A BEACON 3.0 Implementation Team is being developed, and additional information about implementation, including the BEACON 3.0 “go live” date, will be forthcoming.

Decrease in Federal Mileage Rate

Effective immediately, TAO staff must use the federal mileage rate of 50 cents per mile when calculating allowable transportation costs to be used as a medical or a dependent care deduction. The new federal mileage rate represents a decrease from the rate issued in an *FYI* in *Transitions* of March 2009.

Cultural Communication

Each month, the Diversity Council offers tips about communicating with people of different cultures.

In Cape Verdean culture, people stand close together when talking and are physically demonstrative, often touching and holding hands (men as well as women).

FYIs

Exclusion of Subsidized Mortgage Payments

Clients who are participating in a Section 8 Homeownership Program use their Section 8 vouchers each month to help pay their mortgage.

The amount of the voucher is excluded from the client's countable income for SNAP purposes. This amount is also excluded from the shelter costs in the SNAP benefit calculation. For TAFDC and EAEDC, the amount of the voucher is not counted for asset and income purposes.

For example, if a client's total mortgage (including principal, interest, taxes and homeowner's insurance) is \$1500 per month, and the client receives a voucher for \$1000 per month, the \$1000 is excluded from the client's countable income. For SNAP, the \$1000 is also excluded from the client's shelter costs. The resulting amount of shelter costs for the SNAP benefit calculation is \$500 rather than the full mortgage amount of \$1500.

Sexual Harassment Policy

Sexual harassment of employees in the workplace or in other settings related to their employment is unlawful and will not be tolerated by the Department. Commissioner Kehoe recently issued the Department's *Policy for the Prevention and Elimination of Sexual Harassment in the Workplace*. The policy outlines the procedure by which inappropriate conduct will be dealt with and includes:

- the definition of sexual harassment;
- responsibilities of all Department employees;
- responsibilities of each Department Manager and Supervisor;
- how to file a complaint of sexual harassment;
- procedures for investigating complaints;
- disciplinary action;
- state and federal remedies; and
- whom you can contact for help.

The policy can be found on DTA Online under "Administrative Memos" and on the Legal Division's page under "Memos Related To Employee Conduct."

Please note: the signature page at the bottom of the policy does not need to be completed at this time.

TAO Meeting Notes