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## From the Commissioner

Dear Colleagues,

Each year, the Human Resources Division coordinates the annual Commonwealth of Massachusetts Performance Recognition Program. This program gives formal recognition to Commonwealth employees who make meaningful contributions, which distinguish them from their peers. These special awards focus attention on consistent, positive achievements by both individuals and teams of state employees, and recognize those who demonstrate innovation and dedication to their work, concern for the public trust and a commitment to excellence.

I am thrilled to announce that seven individuals and teams from the Department have been awarded. Please join me in congratulating:

### **BEACON 3.0 News You Can Use Work Group**

This group, comprised of Central Office staff members Larry Whelpley, John Stella, Cynthia Zabin, Joe Hogan, David Montenegro, Dana Stancill, and Elizabeth Rattigan developed (in addition to their regular duties) a document that captured changes and updates related to BEACON 3.0 during its implementation and launch. Collaborating across multiple units, they regularly distributed accurate, timely information to all staff. Their efforts helped everyone to become familiar with BEACON 3.0. As a result, the Department continued to provide benefits to clients with minimal disruption.

### **BEACON 3.0 User Acceptance Testers (UAT)**

More than 150 of our colleagues across the state volunteered to test BEACON 3.0 before it went live. In addition to their regular duties, this group learned the new web-based eligibility system, tested scenarios, and offered suggestions to make BEACON 3.0 as user-friendly as possible. Once the system went live, members of the UAT team were the go-to experts in their offices to assist their co-workers to navigate the new process. Approachable, knowledgeable, and always willing to help, this group truly went above and beyond the call of duty to ensure our Department could continue to meet its mission during the exciting transition to BEACON 3.0.

*(Continued on page 2)*

## From the Commissioner *(Continued from page 1)*

### **Wendy Buttrick**

Wendy is a SNAP supervisor in the Hyannis TAO who jumped at the chance to oversee a unit comprised entirely of new employees. Her professionalism and team spirit are contagious, and the new case managers exhibit the same qualities. Although Wendy has no formal training as an instructor, she is a natural at explaining complex policy and procedures and at fostering critical skills in customer service and time management. Her efforts with the new hires epitomize the spirit that she brings to the office and the job each and every day.

### **Micki Elmi and Elizabeth Roche**

Micki and Elizabeth are supervisors in the Worcester Transitional Assistance Office (TAO) who, in addition to their existing workloads, volunteered to utilize their skills, knowledge and experience to provide In-Service Training (IST): the mentoring, training, and supervision of new hires. Their commitment was instrumental in the success of the new employees. Their tasks included reviewing and authorizing the new employees' cases; providing feedback and guidance; maintaining contact with the Training Unit to discuss progress and identify issues; establishing best practices for time management and workflow; and conducting assessments.

### **Julie Noble**

Julie is a member of the Field Operations staff at Central Office. With invaluable knowledge and expertise, Julie is well-respected by all of her colleagues and is the go-to person for countless projects and initiatives across all units and divisions. She volunteers her assistance without hesitation and provides continuity, insight, and a wealth of information and experience.

### **Rose Tomczewski**

Rose is a supervisor in the New Bedford TAO who, with the help of a second supervisor, designed and implemented a training schedule for six new hires that included a daily meeting, classroom training, job shadowing, and casework. Throughout this process Rose led by example, demonstrating the correct resolution of difficult cases and adeptly handling her increased workload. Rose instilled in the new employees a positive and enthusiastic attitude, and her mentorship helped them to succeed.

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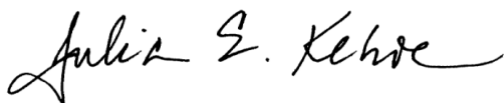
## From the Commissioner *(Continued from page 2)*

### Lorraine Ward

Lorraine is an outstanding BERS worker in the Revere TAO. She is dedicated, self-motivated, and always goes the extra mile for both clients and co-workers. Her cases are always current, and her applications, reviews, matches and other casework are processed timely and accurately. Lorraine returns her phone messages promptly, sees her clients at their appointment time, and is flexible to accommodate the needs of walk-in clients. In addition to her regular duties, Lorraine volunteered to complete the SNAP duty and “off rotation” schedules for all the SNAP units.

I congratulate all of the award winners for their accomplishments, dedication, and leadership. Each of you truly embodies our mission to assist low-income individuals and families to meet their basic needs, increase their incomes, and improve their quality of life.

With much appreciation,



Julia E. Kehoe  
Commissioner

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## Quality Corner

This month we will review two errors that are both related to the SNAP shelter deduction.

### **RSDI Income Incorrectly Entered into BEACON**

The first error was in the case of a 55-year-old, disabled client who lived alone. Her only income on file was \$953.50 per month in RSDI. The BEACON record showed rent of \$460 per month and the heating/cooling SUA. The RSDI income was entered on the Other Income page, but the Federal Certify indicator was set to No. Since the client is under 60 years old, and the Federal Certify indicator was set to No, BEACON did not recognize the client as a disabled individual; therefore her shelter deduction was incorrectly calculated. In SNAP, a household containing an elderly or disabled individual is allowed an uncapped shelter deduction amount in the SNAP benefit calculation. Because the disability was not indicated through the Federal Certify indicator, the SNAP benefit was incorrectly calculated, causing an underpayment for the review month.

### **What's a Case Manager to Do?**

The case manager should have indicated that the client was disabled by selecting the Yes radio button of the Federal Certify Indicator on the Disability page. This would have triggered BEACON to calculate her SNAP benefits as a disabled household, and therefore she would have been eligible for uncapped shelter expenses. In SNAP, a household that does not include an elderly or disabled individual is allowed a shelter deduction of no more than \$458 per month. **Note:** This maximum shelter deduction amount is updated as part of the annual cost-of-living adjustment (COLA).

When RSDI income is entered on the Other Income page, BEACON requires that the case manager visit the Disability page. By going to the Disability page, the edit will be satisfied even if the case manager does not complete the Federal Certify Indicator. Since all RSDI recipients are not disabled, this edit does not suggest a specific activity for the Disability page. It is the case manager's responsibility to know if the client's RSDI is retirement, survivors or disability income. If the recipient of RSDI is disabled, the case manager must select the Yes radio button of the Federal Certify Indicator on the Disability page.

### **Incorrect Standard Utility Allowance (SUA)**

The second error was in the Non Public Assistance (NPA) case of a 76-year-old client who lived alone. At certification, the client reported that she received \$931.78 per month from a pension and RSDI of \$351.50 per month. Her rent was \$265 and she paid for air conditioning.

QC determined that the case manager processed the case using a pension of \$904.64, which was a prior pension amount. The case manager also allowed this client the nonheating SUA which was \$375 at the time. The application form had clearly indicated the pension amount and the fact that the client paid for air conditioning. Using the incorrect pension and SUA type caused the household to receive a monthly allotment of \$16, which was an underpayment for the review month.

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## Quality Corner (Continued from page 4)

### What's a Case Manager to Do?

Case managers must be careful when extracting information from an application or recertification form for case processing. The pension amount used was a previous lower amount and the SUA type used was incorrect. Supervisors also play an important role in ensuring that the information presented by the case manager for supervisory sign-off is correct by checking that it is supported by what is recorded on the application or recertification form and that the information is verified when appropriate.

For error prevention strategies for both errors discussed in this version of Quality Corner, see *Keys to Preventing Errors* outlined in Quality Corner of February 2008.

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## From the Forms File

### New Brochure

The Department of Veterans' Services (DVS) provided the Department with its brochure entitled: *We Owe You! Benefits and Services*. The brochure explains DVS benefits and services. DVS asks that the brochure be made available in TAO waiting areas for clients.

### New Poster

26-440-0511-05  
*DTA Works Poster*

This poster explains the DTA Works Internship Program for DTA clients and must be displayed in TAO waiting areas. The Spanish version will soon be available.

### New Flyer

26-430-0511-05  
*DTA Works Flyer*

This flyer explains the DTA Works Internship Program for DTA clients and should be made available to DTA clients. The Spanish version will soon be available.

### Revised Brochure

02-615-0511-05 (English)  
02-650-0511-05 (Portuguese)  
02-651-0511-05 (Russian)  
02-652-0511-05 (Vietnamese)  
02-654-0511-05 (Haitian Creole)  
02-616-0511-05 (Spanish)  
*DVB Brochure (Rev. 5/2011)*  
*Domestic Violence Unit – Everyone Deserves to be safe!!*

TAO Domestic Violence Specialists contact numbers have been updated on this brochure.

### Obsolete Forms

The following Employment Services Program (ESP) related forms are now obsolete.

17-060-0999-70  
*ESP-TEMP-1 (Rev. 9/99)*  
*TEMP Questionnaire for Community Organizations*

02-840-0506-05  
*TAA-CORP (5/2006)*  
*TransAction Associates Responsibilities under the Car Ownership Program*

## 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.** Our TAO has received an application on behalf of a TAFDC household consisting of two family cap daughters, and an 18-year-old son. Are there any dependent children in this home?
- A.** Yes, there are three dependents in this household. The 18-year-old remains eligible as long as he:
- remains a full-time student in school not beyond the secondary level or in an equivalent vocational or technical training program leading to employment; and
  - is expected to graduate high school or complete his studies in an equivalent vocational or technical program before his 19th birthday.

For more information on 18-year-old dependents and their eligibility requirements, refer to 106 CMR 203.575.

The family cap children are also dependents and are entitled to MassHealth and SNAP benefits, if otherwise eligible. For more information on family cap policy, refer to 106 CMR 203.300.

- Q.** When a TAFDC case is a household of two married parents and two family cap children, which individuals are included in the assistance unit to receive the TAFDC grant?
- A.** In this situation, both parents would be TAFDC recipients included in the assistance unit, if otherwise eligible.

If the parents are not married and there is no relationship between the children, then each parent and their respective child would have their own case. For more information on relationship requirements, refer to 106 CMR 203.585.

- Q.** A mother receiving TAFDC has a daughter who is not attending high school. The daughter is 17 years old and is currently not in any other school or training program. Does the TAFDC Program require school attendance for this teen?
- A.** No. High school attendance is a priority, but it is not a TAFDC requirement for dependents ages 16 to 18. For more information on dependent children in this age group, refer to 106 CMR 203.570.

A TAFDC dependent between the ages of 16 and 18 who is not attending school is required to participate in an appropriate ESP activity, if one is available. Otherwise, determine whether good cause exists, per 106 CMR 701.380. Since certain ESP programs may have time-limited or cyclical activity, remember to keep up-to-date on which programs currently offer services within your geographic area.

## Operations Memos

### Reminder: Random Moment Sampling E-mail Survey System

All

Operations Memo 2011-12

Federal regulations require the Department to determine administrative expenses for federal and state programs, allowing the Department to receive federal reimbursement for a portion of those expenses. The means to comply with this requirement is the Random Moment Sampling (RMS) process.

RMS is designed to scientifically determine the amount of effort spent by a group of employees on various activities. This memo serves to remind TAO staff about the RMS process.

### Changes to the Resource Team in Worcester and Springfield Liberty TAOs

TAFDC

Operations Memo 2011-13

On June 13, 2006, DTA established Resource Teams in certain TAOs. This on-site Resource Team affords applicants and clients the opportunity to meet with a Resource Team member who provides an assessment of the client's service needs, assistance with completing medical forms, a coordinated approach for the review of barriers to employment, and a coordination of support services. In addition, the Disability Specialist performs on-site short-term disability determinations for certain clients.

The February 5, 2007, *New Initiative Memo* informed TAO staff that, beginning February 12, 2007, the Resource Team at the Springfield Liberty and Worcester TAOs would also offer free assistance to selected TAFDC and EAEDC clients in their areas in applying on-line for Supplemental Security Income (SSI) disability benefits.

Operations Memo 2011-13 serves to advise staff that, effective May 1, there was a reduction of Resource Team staffing in the Worcester and Springfield TAOs.

### TAFDC and SNAP – Income Tax Refunds as Noncountable Assets

TAFDC and SNAP

Operations Memo 2011-15

The Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010 was signed into law on December 17, 2010. This law makes changes to how the TAFDC and SNAP programs treat federal income tax refunds. This Operations Memo outlines changes to how federal income tax refunds are treated as assets for TAFDC and certain SNAP cases.

Income tax refunds continue to be noncountable income for TAFDC (see 106 CMR 204.120 (I)) and SNAP (see 106 363.230 (K)).



## Operations Memos

### TAFDC Community Service Sites Cleanup

TAFDC

Operations Memo 2011-16

The Department has completed its review of the current Community Service Sites List. As a result, the Community Service Sites List has been updated and is now available for use on BEACON. This memo also includes procedures for searching for a Community Service Resource.

### Spring 2011 SNAP Heat and Eat (H-EAT) Program Update

SNAP

Operations Memo 2011-17

DTA, in collaboration with the Department of Housing and Community Development (DHCD), provides H-EAT benefits to eligible SNAP households each year. Households newly eligible for H-EAT benefits will receive a significant increase in SNAP benefits based on receipt of the H-EAT Fuel Assistance Program.

This memo reviews H-EAT Fuel Assistance Program criteria, explains the responsibilities of DTA and DHCD, provides instructions for restoring lost SNAP benefits to H-EAT households and describes the DHCD client brochure. There is minimal case manager impact since the H-EAT Fuel Assistance Program enrollment and SNAP recalculation processes are fully automated.

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### Diversity Quote

**“To effectively communicate, we must realize that we are all different in the way we perceive the world and use this understanding as a guide to our communication with others.”**

**Tony Robbins**



## FYIs

### **Reminder: SNAP Applications Must Include an Interview**

Case managers are reminded that an interview must be scheduled for all SNAP applicants. With the exception of walk-in applications where an interview has taken place right away, all SNAP applications require that the case manager contact the applicant for an interview within two business days of receipt of the application. (See Field Operations Memo 2006-30, *FS (NPA or PA) Application Processing Guidelines*.) Interviews may be conducted by telephone or in person. (See Field Operations Memo-2009-63A, *SNAP: Modifications to the Waiver of the Face-to-Face Interview*.)

An interview must be conducted even if it appears that the application is complete and only verifications are required. Conducting the interview ensures that:

- the information provided on the application is complete and accurate;
- the applicant has understood all the questions; and
- all information that may affect eligibility is entered in BEACON.

The interview is also an opportunity to address any questions or concerns the applicant may have, and may also reduce future telephone calls to the case manager.

**Important:** Operations Memo 2010-51, *SNAP: Suspension of Interview Waiver for Certain Elderly/Disabled Households* is still in effect and an interview is still required. Case managers are reminded not to use the values of Interview Waived or Interview Scheduled/Cancelled on the Interview Method dropdown list until further notice. (See E-Mail 2011-3: *Update on the Elderly/Disabled Waiver (4/15/2011)* in Policy Online under TAO E-Mails – Special Procedures.)

### **Reminder: SNAP Applications Must Be Processed Within 30 Days**

Case managers are reminded that all SNAP applications must be approved or denied on or before Day 30. If Day 30 falls on a weekend or holiday, the application must be approved or denied on the day immediately following the weekend or holiday.

Remember also that PA/SNAP households must be approved or denied by Day 30, regardless of the status of the TAFDC or EAEDC application, even if the applicant has been granted an extension (INT-2) to provide verifications for cash program benefits.

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## TAO Meeting Notes