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Joseph Gallant
Secretary
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Field Operations Memo 97-20
June 1, 1997

TO: Local Office Staff
FROM: Joyce Sampson, Assistant Commissioner for Field Operations
RE: Monthly TAFDC Age 60 Report

Introduction

The Monthly TAFDC Age 60 Report has been developed to identify TAFDC cases in which cash eligible recipients and sanctioned recipients will be turning age 60 in the month following the month of the report. Attachment A provides a sample of the Monthly TAFDC Age 60 Report.

The initial run of this report (run in May) includes all recipients who are age 60 or older through the end of May and recipients who will be turning age 60 in June. Subsequent reports will be received monthly in the last week of the month.

**Identification of
Persons Age 60**

An active TAFDC case with a recipient turning age 60 or older must be coded on the recipient masterfile with the SAVE Code R (unless the SAVE Code is being used to flag the case for a sanction reason). SAVE Code R is worker generated and used when a grantee is exempt from time-limited benefits, reduced need and payment standards, and work program requirements due to age. In a two-parent household, both grantees must be age 60 or over for SAVE Code R to be appropriate.

For more information regarding SAVE Codes refer to *Systems User's Guide, Volume 1: PACES User's Guide, Appendix B: PACES Turnaround Document Codes.*

**Local Office
Actions**

Worker Actions

Each month, upon receipt of this report, local office workers must review each case, including a review of all action reasons and the Program Code associated with the case, to confirm the date of birth of the recipient(s) and that the recipient(s) is turning age 60. Once these recipients have been identified and the case reviewed, enter SAVE Code R in PID block 43 and if appropriate change the Program Code and action reason. If the action reason and Program Code on file are correct, then no change is necessary.

Workers must annotate the report with the actions taken and submit the report to the supervisor for review.

Retroactive Benefits

Recipients who turned 60 before or during May 1997 may be eligible for retroactive benefits if they were formerly coded as nonexempt. Workers must calculate the amount of retroactive benefits owed, if any, and issue a Q payment. Retroactive benefits should go back to the date the recipient(s) turned 60 or the date the policy changed (12/96), whichever is later.

Director Responsibilities

The director must ensure that all reports are reviewed, and appropriate actions completed.

**Report
Distribution**

Distribution of this report will change on a monthly basis. For example, the initial run of this report will not include several offices, while the following distributions may include a larger number of offices or a lesser number of offices.

The following offices will not receive an initial run of this report: Athol, Boston Homeless Unit, Falmouth, Nantucket, North Adams, Oak Bluffs, Pittsfield, Wareham and Woburn.

Report Summary The TAFDC Age 60 Report is run monthly and sorted by local office and CAN and includes the following data elements:

Category
Case Social Security Number
Case Name
Case Action Reason
Program Code
SAVE Code
Dependent Number
Dependent Name
Dependent Date of Birth
Dependent PA Status
Dependent PA Action Reason
CAN Total
LWO Total

Questions If you have any question, have your Policy Hotline designee call the Policy Hotline at (617) 348-8478. Systems-related questions should be referred to Customer Support Services at (617) 348-5290.
