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Department of Transitional Assistance
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Secretary

Claire McIntire
Commissioner

Field Operations Memo 98-42
October 6, 1998

TO: Transitional Assistance Office Staff

FROM: Joyce Sampson, Assistant Commissioner for Field Operations

RE: PRISM II Reconciliation

Background

Any PACES transaction which is not transferred to PRISM II will result in a discrepancy between the two databases. For example, a closing transaction in PACES which does not transfer over to PRISM II will result in the case being closed in PACES but still appearing as active or pending in PRISM II.

Reconciliation compares data from the PACES and PRISM II databases and looks for discrepancies resulting from transaction failures. Some transaction failures took place at the time of initial data transfer from PACES to PRISM II during PRISM II startup. Others occur during the nightly update from PACES to PRISM II. Transaction failures between PACES and PRISM II are beyond the Transitional Assistance Worker's control and are inherent in the system.

Because some "PACES to PRISM II" transactions fail daily, reconciliations must be done periodically to ensure the integrity of the PRISM II database. During reconciliation, some discrepancies are corrected by the system, but others must be looked at by the Transitional Assistance Worker to determine what corrections must be made.

**Background
(cont.)**

The goal of Reconciliation is to eliminate all discrepancies between PACES and PRISM II. An initial reconciliation, completed in March 1998, compared *recipients* known to PACES with those known to PRISM II, and added missing recipients to PRISM II.

A second, more detailed reconciliation between the PACES and PRISM II databases was completed in August. Reconciliations will continue to be performed to ensure the integrity of the PRISM II database.

**Purpose of
Memo**

This memo:

- identifies in detail the data updated in PRISM II by Reconciliation;
 - explains the rules used in updating data on PRISM II;
 - introduces the new PRISM II Reconciliation screen, which identifies certain cases and recipients with data updated by Reconciliation that may require follow-up;
 - describes the impact that Reconciliation has on Transitional Assistance Office Staff with respect to alerts, letters and, especially, the 24-month clocks;
 - transmits procedures for reviewing TAFDC cases in which a manual adjustment to the recipient's 24-month clock may be required; and
 - addresses other issues related to Reconciliation that will require Transitional Assistance Worker follow-up.
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**Case Data
Updated by
Reconciliation**

Reconciliation consisted of a detailed, element-by-element comparison between the PACES and PRISM II databases. **If a discrepancy existed between the information in PACES and PRISM II, PRISM II was updated to agree with PACES.** The following chart indicates the data elements which were *automatically* updated in PRISM II.

**Case Data Updated
by Reconciliation -
(cont.)**

PACES Data Element	PRISM II Data Element Updated
CAN	Worker Name
TAO	Office Name
Case Status	AU Status & Effective Date
Program Code	AU Exemption Status & Effective Date
Personal Action Reason/SAVE Code	Membership Role & Effective Date
Personal Action Reason	Work Status & Effective Date
Grant Amount & Effective Date	Benefit Amount & Effective Date

Updates to the data above may have the following impact on Transitional Assistance Office Staff:

- Changes to Worker Name or Office Name will result in alerts being generated to the correct TAO and CAN.
 - "Sleeper" alerts may now appear if Reconciliation updated a case from closed to active status in PRISM II.
 - Corrections made to AU Status or Exemption Status, Membership Role, Work Status, Benefit Amount or Effective Dates may affect the recipient's 24-month clock. Manual adjustments to the clock may be necessary for months prior to the reconciliation. Procedures for the review of cases affected by these changes begin on page 5 of this memo. Future months will now accrete correctly.
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**Client Data
Updated by
Reconciliation**

Reconciliation also compared client "identifier" information (name, address, language and marital status) in PACES with that in PRISM II.

Since PACES is a *case-based* system, it is possible for recipients to have different name spellings, addresses, or even language or marital status codes between cases. PRISM II is a *person-based* system. Each recipient can have only one set of identifiers, some of which are displayed on the Client Detail screen. PRISM II was programmed with a set of rules to decide which identifying data to update.

Where differing names, addresses, language or marital status codes existed in differing cases in PACES, the following basic rules were applied:

- The information from the active case, if any, was selected.
- If more than one active case, the information from the case in which the recipient is head of household was selected.
- If the recipient is head of household in more than one active case, the information from the lower category number was selected (Cat 2 before Cat 4, etc.).
- If the recipient is in more than one case but all cases are closed, the information from the most recently closed case was selected.

As an example, Mary Jones has an active Cat 2 case with an address of 123 Broad Street, Brockton. She also has a closed Cat 9 case with an address of 100 Main Street, New Bedford. During the reconciliation, PRISM II selected the Broad Street address (address from active case) and updated the PRISM II database.

Since the demographic data updated by Reconciliation is stored in PRISM II and is not visible on any screen, no worker action is required. However, **before printing any letter produced by the PRISM II "Reports" option, view the letter to make sure that the address PRISM II inserts is correct. Additionally, make sure the letter is produced in the correct language.** If not, complete a PACES Input Document (PID) to change the address or correct the language code. The changes will be updated in PRISM II and can be viewed in a letter the next day.

Client Data Not Updated by Reconciliation

Discrepancies in Social Security Number (SSN), Date of Birth (DOB) or sex in PRISM II were not updated. Procedures for the resolution of these discrepancies, which must be resolved manually, will be issued later.

New PRISM II Reconciliation Screen

The new Reconciliation screen (Attachment B) was developed to identify cases and recipients with data updated in PRISM II as a result of Reconciliation. This screen is accessed through the new "Reconciliation" command button at the bottom of the Main Menu (Attachment A).

The Reconciliation screen identifies Assistance Unit (AU) SSN and name, Client SSN and name, and Program and Benefit Type.

Note: At present, only cases and recipients with updates for Program and Benefit Type "TAFDC Cash" will appear, as these updates could potentially affect the 24-month clocks. Only active, nonexempt cases as of the date of Reconciliation will be displayed initially. Other updates which may require follow-up will be displayed later.

Transitional Assistance Worker Responsibilities

Transitional Assistance Workers must review each case on the Reconciliation screen to see if the recipient's State 60-Month Period and 24-Month Clock are correct.

For each case/recipient on the Reconciliation screen:

- ▶ Review the case record carefully to determine the correct State 60-Month Period start date and correct number of months, if any, which should be counted toward the 24-month limit. Compare this to the PRISM II State 60-Month Period start date and number of months accreted as displayed on the "State Clock" tab of the Client Detail screen.
 - ▶ While looking at each case, click on the "In Progress" indicator whether or not a review for possible clock adjustment is required.
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**Transitional
Assistance
Worker
Responsibilities
(cont.)**

- ▶ For two-parent households, **check both parents' clocks**, even if only one parent appears on the Reconciliation screen.
 - ▶ Refer to *PRISM II User's Guide*, Chapter V, 24-Month Time-Limited Benefits and Appendix C, 24-Month Clock Specification Details, for clock accretion criteria. **Keep in mind that not all clocks will need adjusting.**
 - ▶ Complete the 24-Month Clock Adjustment Worksheet (TP-24AWS, Attachment C) for **every** recipient on the Reconciliation screen. If the 60-Month Period and 24-Month Clock are correct, write "No Adjustment Required" across the top of the worksheet. Keeping a record of months reviewed in the case record will prevent the need to review these months again after subsequent reconciliations.
 - ▶ Submit the signed, completed 24-Month Clock Adjustment Worksheet for each recipient on the Reconciliation screen to the supervisor for review and approval.
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**Supervisor
Responsibilities**

Transitional Assistance Supervisors must:

- ▶ Review all 24-Month Clock Adjustment Worksheets for accuracy.
 - ▶ Compile all State 60-Month Period start date corrections on the new TAFDC-10, State 60-Month Period Update Log (Attachment D). Sign and date each log sheet.
 - ▶ Submit the 24-Month Clock Adjustment Worksheets and State 60-Month Period Update Logs to the Director or Assistant Director for final review and approval.
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**Director/Assistant
Director
Responsibilities**

Transitional Assistance Office Directors or Assistant Directors must:

- ▶ Review and give final approval to all clock reviews.
- ▶ Sign and date the 24-Month Clock Adjustment Worksheets and State 60-Month Period Update Logs.
- ▶ Fax the State 60-Month Period Update Logs to Nancy Salvucci at (617) 348-5111.
- ▶ Ensure that all clock adjustments are entered onto PRISM II.
- ▶ Ensure that a copy of the 24-Month Clock Adjustment Worksheet is filed in the case record.

Note: If the State 60-Month Period must be set or changed, make sure the adjustment is made centrally before changing the 24-month clock. Only months within the 60-month time period may be added to the clock.

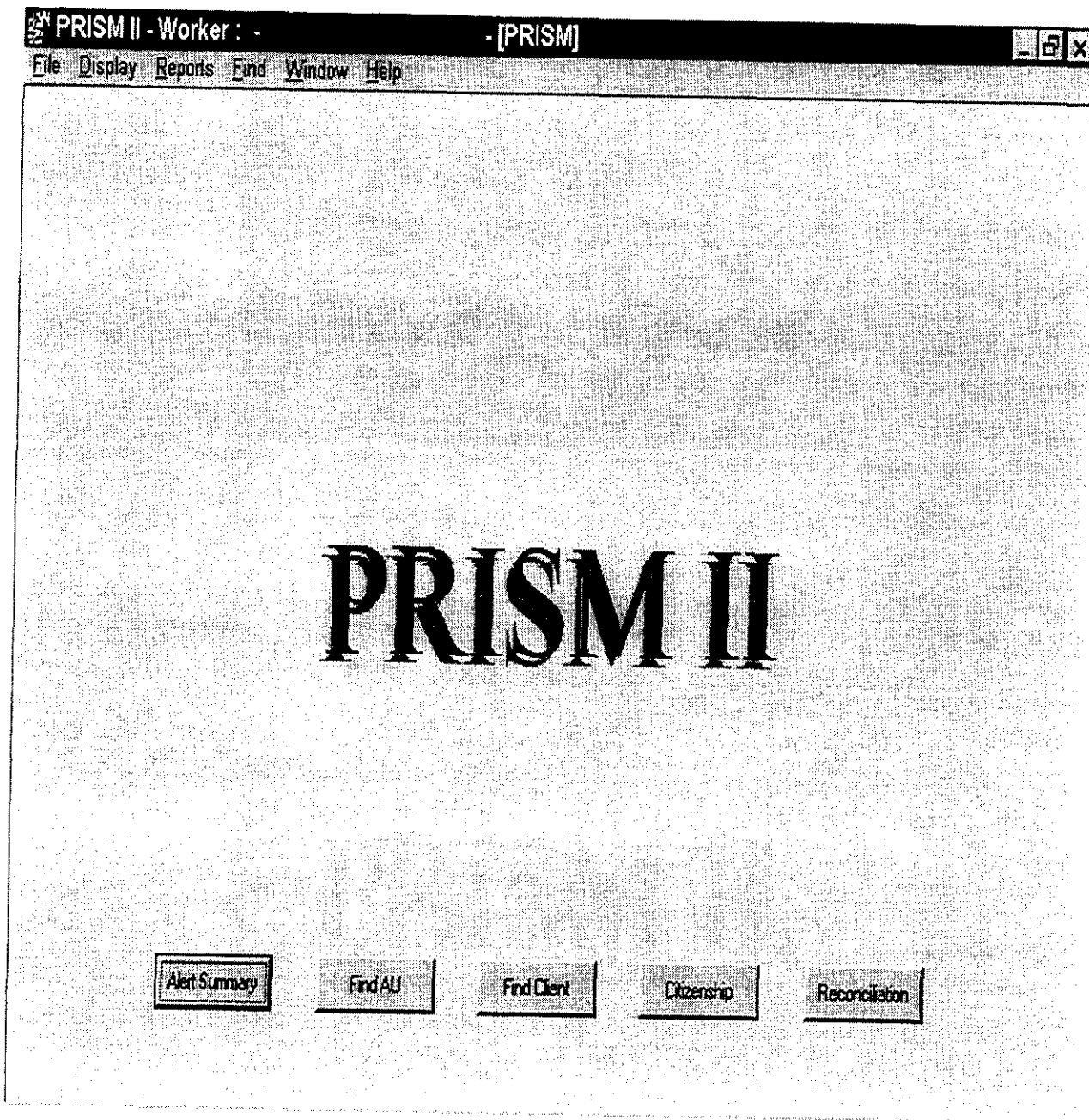
Whether or not a manual adjustment to the 24-month clock is necessary, the TAO Director, Assistant Director or designee must click on the "Completed" box for that recipient on the Reconciliation screen. When the "Completed" box is checked, the row will disappear from the Reconciliation screen the next time the TAO worker logs on.

**Continued
Reconciliations**

Transitional Assistance Workers must continue to access the Reconciliation screen to identify recipients with data updated in PRISM II that may require follow-up.

Questions

If you have any questions, please have your Hotline designee call the Policy Hotline at (617) 348-8478. Systems questions should be directed to Customer Service Center at (617) 348-5290.



PRISM II - Worker : -

File Display Reports End Window Help

Reconciliation

Office Name: WESTFIELD Worker: 243

In Progress	Aut SSN	Aut Name	Client SSN	Client Name	Program Type	Benefit Type	Completed
<input type="checkbox"/>	58		58		TAFDC	Cash	<input type="checkbox"/>
<input type="checkbox"/>	58		58		TAFDC	Cash	<input type="checkbox"/>
<input type="checkbox"/>	58		58		TAFDC	Cash	<input type="checkbox"/>
<input type="checkbox"/>	02		01	R	TAFDC	Cash	<input type="checkbox"/>
<input type="checkbox"/>	02		02		TAFDC	Cash	<input type="checkbox"/>
<input type="checkbox"/>	58	A	58	A	TAFDC	Cash	<input type="checkbox"/>
<input type="checkbox"/>	58		58		TAFDC	Cash	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>

Count: 0

OK



Massachusetts Department of Transitional Assistance
24-Month Clock Adjustment Worksheet

TAO _____

Date _____

Case Name _____

SSN _____

Recipient Name _____ **Client #** _____ **SSN** _____

Correct State 60-Month Start Date ____/____/____

Use this worksheet with the *Prism II User's Guide Appendix C - 24-Month Clock Specifications*.

For the **entire** calendar month of ____/____ was the recipient:
MM YY

Active and/or sanctioned? yes no

Nonexempt? yes no

Receiving a benefit amount greater than \$10 or a Full Employment Program (FEP) or a Supported Work case? yes no

If benefit amount was less than \$10, deduction code _____

Disposition/Explanation

Added Not added

For the **entire** calendar month of ____/____ was the recipient:
MM YY

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If benefit amount was less than \$10, deduction code _____

Disposition/Explanation

Added Not added



State 60-Month Period Update Log

TAO _____

Date ___/___/___

Recipient Name _____

SSN _____

60-Month Start Date _____

Recipient Name _____

SSN _____

60-Month Start Date _____

Recipient Name _____

SSN _____

60-Month Start Date _____

Recipient Name _____

SSN _____

60-Month Start Date _____

Recipient Name _____

SSN _____

60-Month Start Date _____

Recipient Name _____

SSN _____

60-Month Start Date _____

TAO Supervisor Signature

Date

TAO Director/Assistant Director Signature

Date

Fax to Nancy Salvucci, at 1-617-348-5111