



Commonwealth of Massachusetts
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Field Operations Memo 2000-31
November 6, 2000

To: Transitional Assistance Office Staff

From: Joyce Sampson, Assistant Commissioner for Field Operations

Re: BEACON Release 2.0 Pilot Activities

Background

BEACON is an integrated client-based eligibility system that facilitates data collection, determines financial eligibility and calculates the benefit for public assistance programs administered by the Department, including TAFDC, EAEDC, Emergency Assistance and Food Stamp benefits. BEACON also facilitates data collection for support services, such as ESP, child care and transportation assistance, which are available in conjunction with these programs.

BEACON captures information on client eligibility, benefit determinations, reevaluations and benefit issuance, and produces client notices. It also provides financial and management information. For more information on BEACON's functions refer to the November, 2000 draft of *A User's Guide: Transitional Assistance Programs and BEACON* which is being issued to all TAOs.

**BEACON Release
2.0 Pilot Activities**

During this phase of the pilot, AU Managers, TAO Supervisors and Implementation Managers will begin performing the activities described in this memo. These activities will begin on November 13, 2000 and continue through December 22, 2000.

The next phase of activities will include reviewing benefit discrepancies, performing conversion validation activities and conducting interactive interviews. Procedures for these activities will be issued in a subsequent Field Operations memo.

**BEACON Release
2.0 Pilot Activities
(continued)**

BEACON Release 2.0 Increment 40A will be available statewide on November 13, 2000. The data contained in this increment will reflect the caseloads as of October 12, 2000.

Beginning November 13, 2000:

- AU Managers will continue to process their casework activities by entering information on PACES, PRISM, ARTS and BEACON Release 1.0. All payments will continue to be issued from FMCS based upon information received from PACES.
- At the same time, AU Managers will enter specified casework activities in the BEACON Release 2.0 pilot environment. This activity will exercise all functions of the system.

Once BEACON goes into production, PACES, PRISM, ARTS and BEACON Release 1.0 will be shut down and each system's functions will be replaced by BEACON. **During the pilot, all information entered on BEACON will be erased when a new conversion is run.**

Pilot activities provide an opportunity to:

- exercise BEACON Release 2.0 functions by completing program application(s) and case maintenance activities to ensure that each TAO staff member can produce accurate benefit determination(s) in BEACON;
- use *A User's Guide: Transitional Assistance Programs and BEACON* documentation and training materials; and
- develop trained users experienced with the system.

**Accessing
BEACON
Release 2.0 Pilot
Forms**

To access the BEACON Release 2.0 pilot forms referenced in this memo, TAO staff must:

- click on "Start," go to "Programs" and click on "Windows NT Explorer," or right-click on the My Computer icon and select "Explore" from the dropdown box;
- scroll down to the S-drive and double click on it;
- double click on the folder labeled "BEACON 2 Pilot Forms" and then select the appropriate file listed below:
 - the *Step I Checklist* file for the *Step I: BEACON Pilot Activities Checklist*;
 - the *Step II Checklist* file for the *Step II: BEACON Pilot Activities Checklist*;
 - the *Step III Checklist* file for the *Step III: BEACON Pilot Activities Checklist*;
 - the *Supervisor Checklist* file for the *BEACON Pilot Activities Checklist: TAO Supervisor Summary*;
 - the *Implementation Manager Checklist* file for the *BEACON Pilot Activities Checklist: Implementation Manager Summary*; and/or
 - the *Action Center* file for the *BEACON Action Center Report*.

Reminder: These files are read only. AU Managers must save the document under a new name that is eight characters or less in length. (cc:Mail will only allow file names up to eight characters.)

To save the document, the AU Manager must:

- click on the word "File" in the task bar and then click on "Save As" (A popup window will be displayed.);
- click on the down arrow next to the block that reads "Save in" and select the drive and folder you wish to save the document to;
- next to the block that reads "File name," type in the new document name; and
- click on "Save."

**AU Managers'
Responsibilities**

During the pilot, AU Managers must:

- continue to process all casework using current paper forms, and complete necessary data entry activities in PACES, ARTS, BEACON Release 1.0 and PRISM;
- enter specified casework activities into BEACON in accordance with the appropriate *BEACON Pilot Activities Checklist* and the procedures in this memo. For the sample, try to select a case that you recently performed the casework activity on. If you haven't recently performed the activity, you may select any case from your caseload to perform the activity. Omit task(s) that are not part of your regular casework activity. For example, if you are a food stamp worker you do not need to perform TAFDC activities such as Family Cap or extensions;
- update the appropriate *BEACON Pilot Activities Checklist* to track the completion of the activity. Enter the case social security number, the date the particular activity was completed, the length of time it took to complete it and a brief description of any barriers that you encountered;
- using the *BEACON Action Center Report*, e-mail problems/issues to the Supervisor who will e-mail unduplicated problems/issues to the Implementation Manager; and

Note: When reporting problems/issues use WordPad to capture copies of those windows where problems/issues are present, if necessary. Copies can be stored in a file created through WordPad. See Attachment A for detailed instruction on creating screen prints in WordPad.

- forward the information on the *BEACON Pilot Activities Checklist* to the TAO Supervisor, who will e-mail a summary of the unit's activities to the Implementation Manager weekly.

After the appropriate level of authorization is completed, AU Managers must also:

- access the BB options in Gateway to verify that BEACON Release 2.0 transactions have made it to FMCS properly. The BB option will replace the WB option on the mainframe. The master file inquiry is under INQB, the case data inquiry is under RECB and the client data inquiry is under DEPB.

**AU Managers'
Responsibilities
(continued)**

Note: Many of the activities the checklists are dependent on batch jobs running successfully. If the batch job was not successfully run, the activity will not be complete. TAOs are notified daily by an MIS Customer Service Bulletin when a batch job does not run, and detailed information is included in the BEACON Help Screens under BEACON Batch Jobs.

**TAO
Supervisors'
Responsibilities**

In addition to the supervisory duties outlined in the memo titled: *Your Responsibilities As A Supervisor*, issued on March 3, 2000, TAO Supervisors remain BEACON coaches to their unit staff.

The TAO Supervisor must:

- monitor the AU Manager's caseload activities on BEACON;
- review and authorize (approve or reject) the case activities on BEACON;

Note: When authorizing an action (adding a dependent, changing an address, etc.) on BEACON, TAO Supervisors must look at the Verification tab to view any other outstanding verifications. All outstanding verifications must be entered to obtain a correct BEACON Benefit Amount. If any verifications for a specific action are outstanding, those data will not be available to be selected on the Interview Wrap-up Selection window.

- using the *BEACON Action Center Report*, e-mail problems/issues to the Implementation Manager who will e-mail unduplicated problems/issues to the BEACON Action Center;
 - review and compile the information from AU Manager's *BEACON Pilot Activities Checklists*;
 - summarize the activities completed each week by AU Managers using the *BEACON Pilot Activities Checklist: TAO Supervisor Summary*; and
 - every Friday beginning November 17, 2000, e-mail the information summarized on the *BEACON Pilot Activities Checklist: TAO Supervisor Summary* to the Implementation Manager who will forward it to the Regional Director each Monday.
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BEACON Action Center Unduplicated problems/issues/questions must be e-mailed to the BEACON Action Center by the Implementation Manager using the *BEACON Action Center Report*. To e-mail using the DTA e-mail system, select Action Center, BEACON.

Questions Questions should be e-mailed by the Implementation Manager to the BEACON Action Center. To e-mail using the DTA e-mail system, select Action Center, BEACON.

Creating Screen Prints in WordPad

Following are some quick step-by-step instructions on how to access and use WordPad to create screen prints.

1. Click on the **Start** button.
2. Go to **Programs**, then to **Accessories**, then down to **WordPad**.
3. Open and then Minimize **WordPad**.
4. Access the window to be copied.
5. Press the **Print Screen** button on the keyboard.
6. Maximize WordPad.
7. Go to **Edit** on the menu bar, then click on **Paste**.
8. Once the window appears within the WordPad screen click on **File, Save As** from the menu bar.
9. Type a file name and select a drive/folder to save the screen print to.
Multiple screen prints can be stored in one file.

These screen prints, once saved, can be sent as an attachment via cc: Mail to the TAO Supervisor, Implementation Manager or BEACON Action Center as needed. See the cc: Mail training package for details on how to create an attachment in cc: Mail.