



Commonwealth of Massachusetts
Executive Office of Health and Human Services
Department of Transitional Assistance
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Field Operations Memo 2007-7
February 12, 2007

To: Transitional Assistance Office Staff
From:  John Augeri, Assistant Commissioner for Field Operations
Re: TAFDC – Participation Tracking Actuate Report

**Purpose of
Memo**

To ensure that TAO Staff are better able to track work program participation, a new Actuate Report has been created to help AU Managers, Supervisors and TAO Managers monitor their caseloads. Effective Monday, February 12, the report is available.

Having Work Program and ESP participation data located on one report will help make it easier for TAO Staff to monitor and track:

- work program participation;
- sanction actions needing action/authorization; and
- good cause/meets compliance end dates.

This will ensure that all work program required recipients are meeting their work program participation requirements.

This memo provides TAO staff with:

- instructions to access the Actuate report; and
 - a description of the new Actuate report.
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**Accessing
Actuate**

To access Actuate:

- Double click on the “Actuate Report Viewer” icon on BEACON;
 - Type in his or her “WEL ID” in *lower case letters* in both the “Name” and “Password” fields, click on “Log On” or press “Enter” on the PC keypad; and
 - Click on “BEACON2.”
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**Accessing the
Actuate
Participation
Tracking Report**

To access the Participation Tracking Report, TAO Staff must:

- Select the “Field_Ops_Staff_TAO_Reports” folder;
- Select “TAFDC_WP/ESP_Participation_Tracking_Reports”;
- Click on “TAFDC WP/ESP Participation Detail Report” (for a detailed report of AUs);
- Click on “2007”;
- Click on the month; and
- Click on the document listed on the “Documents You Can View” field. The report information will be displayed for review by TAO Staff.

IMPORTANT: The report information will display AP/AU participation as of close of business on the Thursday before the run date. Information on the report will be current as of that date. For example, if the report has a run date of 2/17/2007 the information on the report will reflect AP/AU information as of close of business 2/15/2007.

**Actuate Report
Navigation Bar
Functionality**

Once in the Report, TAO Staff can use the Navigator Bar to move through the report.

- Click on “NavBar” to select the Report results by Office Detail, Office Summary or Statewide Totals.
 - Click on “Next” to get the next page of the report. (This will activate the “First” and “Prev” option.
 - Click on “First” to go to the first page of the report.
 - Click on “Prev” to go to the previous page of the report.
 - Click on “Last” to go to the final page of the report.
 - Click on “Go To” and type in the page number in the “Page” field to go to that particular page.
 - Click on “Download/Print” and select either “All,” “Current Page” or type in the range of pages (example: 7-12) in the “Pages” field, click on “View PDF” and click on the “Print” icon to print the selection requested.
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Actuate Report: The “TAFDC WP/ESP Participation Detail Report” will have the following
Detail Report data elements to be used as a tool to help AU Managers monitor caseload participation:

- 1). TAO.
 - 2). Supervisor and AU Manager.
 - 3). Client Name.
 - 4). Client SSN.
 - 5). Grantee Indicator – will be “Y” if the AP is a grantee and “N” if the AP is not a grantee.
 - 6). Work Program – shows the most current “Work Program Required Reason” from the Work Requirements window.
 - 7). Hours Participated – shows the total number of actual monthly hours the AP participated in all activities. This information is also located in the “Hours Participated” field on the “Work Requirements” window on BEACON. The report information will display AP/AU participation as of close of business Thursday before the run date printed on the report. For example, if the report has a run date of 2/17/2007 the information on the report will reflect AP/AU information as of close of business 2/15/2007. If Monthly Reports, Supported Work or Participation and Attendance forms are entered into BEACON after 2/15/2007, those hours will not appear on the 2/17/2007 Report. They will appear on the 2/24/2007 Report.
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Actuate Reports:
Detail Report
(continued)

8). Participation Status – will display using the following order if the situation exists (as one of these situations is resolved or completed it will be replaced on the subsequent run of the report by the next one of these situations, if it exists, for the same AP). AU Manager actions needed for AUs on this report appear in italics:

- a) **60 Day Work Search Period** (will only be displayed if the “End Date” is prior to or is the current date) *If not already contacted, the AU Manager should contact the recipient to ensure he or she is meeting his or her work program requirement as soon as possible;*
 - b) **Meets Compliance** (will display all reasons except “Participation”) *If the “end date” has expired, the AU Manager must contact the recipient to determine if the situation still exists. If the situation no longer exists, the reason must be changed to “Participation” and the recipient must meet the Work Program requirement;*
 - c) **Good Cause** (will only be displayed if the “End Date” has not expired or has expired within the past 30 days) *If the “end date” has expired, the AU Manager must contact the recipient to determine if the situation still exists. If not the recipient must meet the Work Program requirement;*
 - d) **Pending WP/ESP Sanction - No Wrap-up** (will only be displayed until the pending sanction is removed or a new Interview Wrap-up sanction request is created as a “Pending Authorization”);
Note: These are sanctions that were either: 1. deleted from Interview Wrap-up and not disposed of on the AU Composition Results window, *in which case the AU Manager must remove the pending sanction from the AU Composition Results window;* 2. are User created sanctions that were never selected in Interview Wrap-up, *in which case the AU Manager must appropriately disposition the sanction;* or 3. rejected authorizations, *in which case the AU Manager must speak with his or her supervisor to determine why the authorization was rejected and take appropriate action.*
 - e) **WP/ESP Sanction Pending Authorization** (will only display if a Batch-created or User-created work program/ESP sanction is “Pending Authorization” on the Interview Wrap-up window);
 - f) **Interrupt Sanction** (will only display until an “Interrupt End Date” is entered) *The AU Manager must take appropriate action (send out a community service referral and/or authorize the sanction) to remove the “Interrupt” status for the sanction process;*
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Actuate Reports:
Detail Report
(continued)

- g) **WP/ESP Sanction Pending Release** (will only display until the work program/ESP sanction action is released) *No AU Manager action is needed;*
- h) **MR Diversion** (will only display if the AU's grant and or food stamp benefits have been diverted due to failure to submit the first monthly report or submit a complete first monthly report);
- i) **(WP/ESP) Sanctioned** (will only display as long as the work program/ESP sanction remains) *No AU Manager action is needed;* or
- j) **(Blank)** (if none of the above is displayed, the field will remain blank).

Some of the reasons why this field will be blank are as follows:

- The recipient's 60-day work search period has ended and the "Day 61" referral date occurs after the "Thursday" date.
- The recipient is within the 10-day referral/response period (he or she has been referred to an activity and has not returned the referral form yet).
- The recipient is within the 20-day warning notice period (he or she has been work program sanctioned and has been sent a warning notice).
- The recipient is doing what he or she is supposed to be doing, but has just started the activity.
- The recipient is starting an activity within two weeks and needs child care authorized.
- The recipient is meeting his or her work program requirement.

9). Participation Status Description:

- ✓ If number 8 on the previous page is "Meets Compliance" the Compliance Reason will be displayed.
- ✓ If number 8 on the previous page is "Good Cause" the Good Cause Reason will be displayed.

10). Participation Status Date: If number 8 on the previous page is:

- ✓ a) through c) the "End Date" will be displayed.
 - ✓ "Pending WP/ESP Sanction – No Wrap-up" the pending status "Start Date" will be displayed.
 - ✓ "WP/ESP Sanction Pending Authorization" the "Created Date" will be displayed.
 - ✓ "Interrupt Sanction" the "Interrupt Start Date" will be displayed.
 - ✓ "WP/ESP Sanction Pending Release" the "Release Date" will be displayed.
 - ✓ "MR Diversion" the "Diversion Date" will be displayed
 - ✓ "(WP/ESP) Sanctioned" the "Entered Date/Release Date" will be displayed; and
 - ✓ "(Blank)" no date will be displayed.
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Actuate Reports:
Detail Report
(continued)

- 11). Removal – will display either “FH” for Fair Hearing, “CO” for Cooperating or “AS” for Administrative/Systems Error sanction removal reasons, if the sanction removal took place within 30 days of the report run date. *If “CO” appears and there is no indication of participation, the AU Manager must review this AU.*
- 12). State Clock Months Used (out of 24).
- 13). Employed Indicator – shows “Yes” or “No.” If a “Wage Type” appears on the Employment Status window this field will show “Yes”.
- 14). Non-Employment Activity – shows “Yes” or “No.” If the AP is enrolled in at least one “non-employment” activity this field will show “Yes.”
- 15). Multiple Non-Employment Activity – shows “Yes” or “No.” If the AP is enrolled in more than one “non-employment” activity this field will show “Yes.”
- 16). Child Care End Date – will show the most current Child Care End Date. If child care is no longer appropriate, or if the end dates are incorrect, please follow instructions in *A User’s Guide: Transitional Assistance Programs and BEACON*, Chapter XII, Section B, Pages 10 through 13 and Field Operations Memo 2004-28 for explanations of the functionality of the “End Date” field. As indicated in *A User’s Guide*, notify the CCR&R of any Child Care termination.

Questions

If you have any questions, please have your Hotline designee call the Policy Hotline at 617-348-8478.
