



**Commonwealth of Massachusetts**  
*Executive Office of Health and Human Services*  
**Department of Transitional Assistance**  
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**Field Operations Memo 2010-21**  
**April 5, 2010**

**To:** Transitional Assistance Office Staff  
**From:**  John Augeri, Assistant Commissioner for Field Operations  
**Re:** TAFDC/EAEDC Eligibility Reviews

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**Overview**

Eligibility Reviews are an integral part of the case management process. They are designed to gather information that leads to the determination of a client's continued eligibility.

With the significant increase in caseloads over the past several years, it is evident that we need to reconsider our requirements for Eligibility Reviews ("Reevaluations" in BEACON) to meet the demands of our current caseload dynamics.

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**Purpose**

The purpose of this memo is to:

- remind staff of the minimum timeframe for conducting Eligibility Reviews for TAFDC and EAEDC cases;
  - discuss the manner in which case managers may conduct Eligibility Reviews; and
  - introduce the letter entitled *Cash Appointment Letter Telephone Interview* (Attachment A).
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**Frequency of Eligibility Reviews**

Full Eligibility Reviews must be conducted on all TAFDC and EAEDC cases, at a minimum **every 12 months**. However, when clients visit the office to transact other DTA business such as completing/submitting monthly reports, reporting address changes, adding a new household member(s) etc., case managers should take the opportunity to complete an Eligibility Review, if appropriate.

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**Manner of Eligibility Review Interview**

In an effort to improve customer service, increase efficiency and reduce the case processing workload for case managers, effective immediately, Eligibility Reviews may be conducted by telephone. The Department will no longer mandate a face-to-face interview for Eligibility Reviews.

When conducting a telephonic Eligibility Review, the following conditions must be met:

- the same questions must be asked and the same information must be requested during the telephone interview as the face-to-face interview; and
- the verification processes and timelines for submission must be consistent with the face-to-face interview.

A face-to-face Eligibility Review must be conducted when:

- requested by the client or their authorized representative;
- the client does not have access to a telephone;
- the case is coded with a heightened level of security;
- the exemption status changes;
- the client has used 22 months of time limited benefits, or
- information provided during the telephone interview is questionable.

**Note:** Limited English Proficiency is **not** an appropriate reason for requiring a client to have a face-to-face interview rather than a telephone interview. See Field Operations Memo 2008-16, *Department Interpreter Services Enhancements*, for more information.

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**Cash  
Appointment  
Letter Telephone  
Interview**

A new letter entitled *Cash Appointment Letter Telephone Interview* has been developed. When scheduling a telephonic interview for an Eligibility Review, the case manager will utilize this letter. This letter can be found in the Online Forms folder in Policy Online.

When completing the *Cash Appointment Letter Telephone Interview* letter, the case manager must circle the program, TAFDC, EAEDC and/or SNAP for which the Eligibility Review is being conducted.

**Note:** The case manager must remember to circle SNAP in addition to the cash program if the appointment is for a combo case (cash and SNAP combined).

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**Mailing  
Completed  
Forms to Clients**

Once the telephonic interview is completed, case managers will inform clients that a form reflecting all information discussed will be mailed to them. Clients should be advised to review the form, sign it and return it in the envelope provided within 10 days of the date of the interview.

Case managers will print the form and issue a BEACON-generated VC-1 allowing the client 10 days to review, sign and return the form as well as return any other needed verifications. Case managers should use the *Other Information* feature of the BEACON generated VC-1 and annotate that the form must be reviewed, signed and returned within the appropriate timeframe. Each mailing to the client should contain the following:

- a completed Reevaluation Form;
  - a VC-1; and
  - a return envelope with the TAOs pre-printed address.
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**Completing the  
Eligibility Review**

If the client returns the signed form and verifications, process the Eligibility Review following procedures in *A User's Guide, Transitional Assistance Programs and BEACON*, Chapter IV, Section C.

**Important:** If the case includes SNAP benefits as well, the case manager must remember to certify the SNAP benefits for 12 months.

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**Completing the Eligibility Review (continued)**

If any of the following occurs, the case manager will take action to close the case by going to the AU Composition Results window and selecting the closing reason “Failure to Submit the Required Verifications”:

- the client returns the verification, but does not return the signed form; or
- the client returns the signed form but does not return the verifications; or
- the client returns neither the verifications nor the signed form.

**Reminder:** Do not close the SNAP benefits if the case manager has sufficient information to certify the SNAP benefits.

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**Existing Documentation: A Users Guide: Transitional Assistance Programs and BEACON.**

This memo overrides TAFDC and EAEDC instructions found on Page 1 of Chapter IV, Section C of *A User Guide: Transitional Assistance Programs and BEACON*.

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**Questions**

If you have any questions, please have your Hotline designee call the Policy Hotline.

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## Cash Appointment Letter Telephone Interview

**Name** \_\_\_\_\_ **Date** \_\_\_\_\_

**Address** \_\_\_\_\_

**Telephone Number(s)** \_\_\_\_\_

A telephone appointment interview has been scheduled for you on \_\_\_\_\_ at \_\_\_\_\_. Your case manager will call you at the number you provided to us. This interview is required to complete your Eligibility Review for TAFDC/EAEDC/SNAP assistance benefits.

If you are unable to keep this telephone appointment, or you prefer to be interviewed in-person at the DTA Office, you must contact your case manager at the telephone number listed below.

Your assistance may be terminated if you do not keep or reschedule this appointment.

If your case manager cannot reach you at this time because your line is busy or you fail to answer your phone, this will be treated as a missed appointment.

**Case Manager's Name** \_\_\_\_\_

**Case Manager's Telephone Number** \_\_\_\_\_