

# Transitions

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## this month in...

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## From the Commissioner

Dear Fellow Employees,

Whether we file early or procrastinate until the bitter end, all of us eventually do our taxes. As more of our cash and food stamp families join the working world, they too will face the same federal and state tax filing requirements. While the April 15th deadline looms in *our* minds, the promise of a tax refund or credit means that some of our clients are anxious to file sooner. For these individuals, using the Earned Income Credit (EIC) is a small step on the road to improving their “financial literacy.” This term refers to a person’s ability to make sound financial decisions in both the short term and the long term. The effort to raise financial literacy standards, including awareness about the EIC and other work incentives, is related to our Department’s mission because it helps our families become self-sufficient.

Despite the importance of the EIC and tax refunds, not every family files for these financial benefits. Last year, in the city of Boston more than 6,000 families and individuals left nearly \$10 million in federal and state EIC funds unclaimed. For this reason, we recently mailed a letter to our clients reminding them about the EIC. Even for those who do not owe income taxes, the Earned Income Credit can be a significant financial boost. For a single parent with two or more children, the federal EIC amount on an adjusted gross income of \$34,458 is \$4,300. The state EIC amount will be 15% of the federal EIC payment. For some, the credit may be well over \$4,000, but even for those receiving a lower amount the benefit goes a long way toward increasing the earning power of households across Massachusetts. As you are aware, the EIC is considered noncountable *income* in all of our Department’s programs. During the month of receipt as well as the following month, the EIC is also considered a

noncountable *asset*. (It is only during the third month after receipt that any remaining savings from the EIC are countable.)

For those of our clients with access to a computer, information on the state EIC is obtainable online at the DOR website: <http://www.dor.state.ma.us/>. Information on the federal EIC is found at <http://www.irs.gov/>. There are also a number of free tax preparation sites. In addition to locations in the Greater Boston area, Volunteer Income Tax Assistance (VITA) staff and other free tax preparation services are available in each region of the state. Clients looking for help preparing their taxes can make an appointment at one of these locations during the evening hours and even on the weekends. Some of you may have noticed the service at your local library. For clients with more immediate needs, these nonprofit tax preparers may also help with requesting a portion of the federal EIC payment in advance of the usual filing deadline. Although few clients are familiar with the process (Form W-5), the IRS continues to offer this option. Even beyond the 15<sup>th</sup> of this month, it's not too late to file. Any family that has failed to take advantage of the EIC over the past three years still can. Clients need only request an amendment to their prior returns (Form 1040X).

Over the past few months, I've written to you about our emphasis on full engagement and transitioning our clients to work with the help of childcare, education and job training services. To achieve financial stability, some families may need to rely on an even broader network of supports. By promoting the EIC benefit, you're helping clients to further tilt the scales in their favor. I want to thank you all for reminding our clients about the EIC.

In closing, I'd also like you to join me in congratulating John Augeri on his recent appointment as Deputy Assistant Commissioner for Field Operations. Some of you have had the pleasure of working alongside John in Cambridge, Salem and Lawrence and many of us are familiar with the attributes he brings to his new job.

Sincerely,



John Wagner, Commissioner

## Quality Corner

This month we will review two errors dealing with the incorrect designation of citizenship status on BEACON.

The first case involved a child, age 13, who entered the country as a Legal Permanent Resident (LPR) on January 14, 2003.

The AU was certified on January 10, 2004, but this child was excluded as an ineligible non-citizen. The Legal FS Disqualified indicator was incorrectly coded "Yes" in answer to the prompt question: Is this person a legal noncitizen who is ineligible to participate in the federal Food Stamp Program?

The child is an LPR and eligible to participate in the Food Stamp Program (FSP), and the Legal FS Disqualified indicator should have been coded "No." For noncitizen children, there is no additional noncitizen requirement, such as date of entry or duration in the country. In October 2003, all noncitizen children under 18 years old, residing in the U.S. in a qualified status became eligible for the FSP. See 106 CMR: 362.220.

The second case involved a noncitizen who has an INS designation of Undetermined and her child who is a citizen. The Legal FS Disqualified

indicator was coded “Yes” for the undetermined noncitizen. Consequently, her income was not counted in the food stamp calculation. For a noncitizen whose INS designation is Undetermined, the Legal FS Disqualified indicator must be coded “No.”

### What Can an AU Manager Do?

AU Managers must carefully consider the INS designation of the person for whom the question is being asked when asking if a person is a legal noncitizen who is ineligible to participate in the federal Food Stamp Program (FSP) before coding the Legal FS Disqualified indicator. Remember, the Legal FS Disqualified indicator drives the food stamp calculation—specifically, the income and expenses to be used. If the Legal FS Disqualified indicator is incorrectly coded, the AU’s food stamp benefit amount will be wrong, and will be found in error by Quality Control.

Above right is a chart listing certain INS designations and their corresponding Legal FS Disqualified coding. This chart is not exhaustive. Some INS designations are more complex and must satisfy other requirements for FSP eligibility.

These INS designations are not listed in the chart and must be evaluated on a case-by-case basis by the AU Manager.

Coding the Legal FS Disqualified Indicator for Corresponding INS Designations	
INS Designation on BEACON	Legal FS Disqualified Indicator
Amerasian, Cuban/Haitian, Asylee, Refugee, Deportation Withheld Noncitizen	<b>No</b> Rationale: Legal noncitizens who are eligible for the FSP.
Nonimmigrant (diplomats, students, visitors)	<b>No</b> Rationale: Legal noncitizens who have never been eligible for the FSP.
Undetermined, Deportation Order Shown	<b>No</b> Rationale: A noncitizen whose immigration status is proven to be illegal or undeclared to DTA.
PRUCOL	<b>Yes</b> Rationale: Legal noncitizens who were disqualified for the FSP by the Welfare Reform Act of 1996.

## From the Forms File

### Revised Forms

*18-083-0405-05*  
*LL/VER (Rev. 4/2005)*  
*Landlord Verification*

The *Landlord Verification* form has been revised to address recent Quality Control errors related to the heating/cooling Standard Utility Allowance (SUA).

*18-070-0405-05*  
*VLA (Rev. 4/2005)*  
*Shared Housing Verification*

The *Shared Housing Verification* form has been revised to address recent Quality Control errors related to the heating/cooling Standard Utility Allowance (SUA). The Spanish version will soon be available.

*09-375-0305-05*  
*09-376-0305-05(S)*  
*FS-USR-2 (Rev. 3/2005)*  
*Universal Semiannual Reporting (USR) Income Guidelines Form*

The Categorical Eligibility USR AU Gross Monthly Income Standard has been revised to reflect the increase in the 200% of Federal Poverty Guideline standard.

## Revised Brochures

09-070-0305-05

09-079-0305-05(S)

*FSP-INFO (Rev. 3/2005)*

*How to Get Food Stamp Benefits*

The Income Standard for households with children under 19 and for a pregnant woman living alone has been revised to reflect the increase in the 200% of Federal Poverty Guideline standard.

02-615-0305-05

*DVB (Rev. 3/2005)*

*You and Your Children Deserve to Be Safe*

This brochure has been reformatted, and now includes the Domestic Violence Specialists' contact information. Other language versions will soon be available.

## Forms/Brochures Available in Other Languages

The following forms and brochures are now available in Spanish.

09-361-0305-05(S)

*SuppA-1 (Rev. 3/2005)*

*Supplement A: Questions Regarding Citizenship Status*

25-171-0305-05(S)

*FSA-1 (Rev. 3/2005)*

*Food Stamp Benefits Application*

25-411-0305-05(S)

*NCRB (Rev. 3/2005)*

*Noncitizen Resource Brochure*

The following brochure is now available in Haitian Creole.

25-402-0305-05(HC)

*NCIB (3/2005)*

*What Noncitizens Need to Know*



## From the Hotline

**Q.** Last week, a TAFDC grantee in my office received a School Change Notice from the Centralized Learnfare Unit (CLU). The notice informs her that one of her sons was no longer enrolled in the school he had been attending for the past three years. The notice asks the grantee to provide information on her child's current school, current grade and current school address. It has been over ten days since the grantee was sent this notice, and I still have not heard back from her. How do I proceed?

**A.** If the grantee has not responded to CLU's School Change Notice, take the appropriate action to close only this child. At the AU Composition Results window, select the appropriate child, reason category (noncooperation) and reason (fail to submit required verifications). Neither the grantee nor the entire AU is to be closed for failing to provide this information.

More details on Learnfare procedures are in *A User's Guide: Transitional*

*Assistance Programs and BEACON*, Chapter XIII-K-8 through XIII-K-17 and 106 CMR: 203.900.

**Q.** If I reduce the grant amount by ending a child's TAFDC eligibility for failing to provide verifications for the Learnfare requirement (as described in the previous question), can I then apply the Food Stamp Attributed Amount to avoid increasing the food stamp benefits for this AU?

**A.** No. Failure to provide verifications *is not* a Food Stamp Attributed reason. (Remember, however, that failure to meet the Learnfare school attendance requirement *is* a Food Stamp Attributed reason.) For more information on the Food Stamp Attributed Amount, refer to *A User's Guide: Transitional Assistance Programs and BEACON*, Chapter XIV-D-4 through XIV-D-9. Also, see 106 CMR: 363.220 for more details.

**Q.** A food stamp applicant recently arrived here in Massachusetts from Puerto Rico. While in Puerto Rico, she received the Nutritional Assistance

Program (NAP) benefit. Do I count the NAP benefit as income in determining her food stamp benefit amount?

**A.** No. These benefits are not considered income in the Food Stamp Program because, according to the USDA, the benefit is not provided in the form of money payable directly to the household.

**Q.** My applicant received NAP benefits a couple of weeks ago in Puerto Rico. Today (March 16, 2005), she's applying for food stamp benefits here in Massachusetts. If the applicant received an NAP benefit in Puerto Rico for the period beginning on March 1st and ending on March 31st, what is her food stamp start date?

**A.** If all other food stamp eligibility factors are met, this applicant's benefit start date is March 16, 2005. There is no delay in issuing food stamp benefits.

## Transportation Changes

### TAFDC

#### *A User's Guide: Transitional Assistance Programs and BEACON - Update 57*

This update transmits the following changes to Chapter XII, Section C: Transportation:

Division of Career Services (DCS) (formerly Division of Employment and Training (DET)) will no longer provide transportation payments for recipients who are participating in Basic Job Search or Structured Job Search. Transportation for eligible recipients will now be provided by TransAction Associates. No additional AU Manager action is required.

The minimum number of hours the recipient must work to receive transportation payments has changed from 30 hours per week to 20 hours per week.

*"Prejudices are the chains forged by ignorance to keep men apart."*

Countess of Blessington

## Benefit Authorization and Segregation of Duties

ALL

*A User's Guide: Transitional Assistance Programs and BEACON - Update 058*

This User's Guide update transmits the following changes:

Chapter XVII: Interview Wrap-up:

- Managers are required to review and confirm the appropriateness of specific transactions initiated and authorized by one individual.
- This update describes specific actions that must be taken by managers and supervisors to ensure segregation of duties.

## Processing DTA/DMH Food Stamp Applications

FS

Field Operations Memo 2005-13

Throughout the past year, the Department, in partnership with DMH, has tested a streamlined food stamp application process for DMH clients in western Massachusetts. This memo implements the statewide rollout of the simplified application process.

## TAFDC – Reapplication Having Used 60-Day Work Search Period

TAFDC

Field Operations Memo 2005-14

This Memo:

- reinforces instructions for processing applicants who have previously used the 60-day work search period; and
- provides instructions for some work program requirement issues.



## Medex Premium Rate Changes

FS

Field Operations Memo  
2005-15

Blue Cross and Blue Shield of Massachusetts has announced Medex premium rate changes to seven non-group plans: Basic, Bronze, Gold, Standard, Core, Core Plus and Silver. These changes were effective March 15, 2005.

This memo:

- identifies the non-group plans that have changed and the corresponding rate changes;
- issues **interim** procedures for updating an AU participating in the Core Plus Medex plan;
- provides information on updates to food stamp benefits; and
- transmits information for the 2005 Medex Premium Rate Change Report.

## Revised Food Stamp Application Form

FS

Field Operations Memo  
2005-16

This memo identifies changes made in response to Central Office, TAO and advocate suggestions to improve the food stamp application form.

## **DTA/Jewish Vocational Service Food Stamp Outreach Initiative**

FS  
Field Operations Memo  
2005-17

Jewish Vocational Service (JVS) in Boston received a USDA outreach grant to conduct food stamp outreach targeting the working poor.

As part of our continued effort to reduce barriers and to increase food stamp participation, the Department is partnering with JVS to increase food stamp participation.

This memo:

- identifies the JVS client population;
- describes the DTA/JVS application package;
- defines JVS staff responsibilities;
- lists the responsibilities of the DTA AU Manager; and
- explains the DTA/JVS verification requirements and process.



## **TAFDC Regulations Used in Determining EA Eligibility**

EA  
State Letter 1294

This State Letter amends EA regulations by specifying which TAFDC income regulations are used in determining EA eligibility, such as lump sum payments.

## **Income Eligibility Exclusions**

FS  
State Letter 1295

This State Letter implements the following income eligibility exclusions for the Food Stamp Program: additional pay received by a member of the United States Armed Forces as a result of deployment to a combat zone; and income from disaster relief employment received from a National Emergency grant and disaster unemployment assistance.

## **FYI**

### **BEACON Help Revisions**

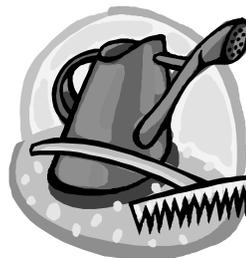
The following is a list of Help windows that have been added or revised.

#### **Added:**

Warnings, Edits and Messages: AU Mandatory/Responsible  
Warnings, Edits and Messages: Noncitizen

#### **Revised:**

AU Mandatory/Responsible  
Noncitizen  
Program  
Reinstate  
Reinstate a Client Closed within 30 Days  
TAO Office Explorer – Youngest Child Turns 6 or 9 View



## **FYI**

### **Treatment of Additional Combat Pay Excluded for Food Stamp Purposes**

State Letter 1295 (see related article on page 7) implements Food Stamp Program exclusions of income by law for additional pay received by a member of the United States Armed Forces as a result of deployment to a combat zone. "Additional pay" is defined as extra payment provided to a member of the Armed Forces for the duration of the member's deployment to or while serving in a combat zone, which was not received immediately before serving in the combat zone.

The additional combat pay exclusion goes into effect April 1, 2005 and is retroactive to October 1, 2004. For the purpose of calculating the amount of lost benefits owed to the AU, the AU Manager must:

- determine the new monthly FS benefit **after** the income has been excluded;
- determine the number of months for which the AU is owed retroactive FS benefits because the income was incorrectly counted in the FS benefit calculation;
- multiply the two numbers from the answers above to determine the lost benefit amount; and
- issue the amount as a Related Benefit: FS Supplement/Immediate Issuance.

Call the Policy Hotline if you have questions about this new regulation.

## **FYI**

### **Utility Moratorium**

Due to the severity of the winter and the below-normal temperatures, the Department of Telecommunications and Energy (DTE) has requested that Massachusetts gas and electric companies extend the moratorium for terminating any heat-providing service contracts from March 15 until April 30, 2005. This will be a voluntary action by the utility companies, but the utilities have always cooperated in this safety initiative.

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