

Transitions



A Publication of the Massachusetts Department of Transitional Assistance

this month in...

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From the Commissioner

Dear Fellow Employees,

Our desire to keep pace with the changing needs of our clients is at the forefront of each new DTA initiative we design. The Individual Development Account (IDA) Program for Educational Advancement is no exception. Beginning in May, certain individuals in Massachusetts will have the opportunity to enroll in this promising new program. Part savings plan and part vocational training, the IDA initiative will help working families by matching their savings contributions dollar-for-dollar.

Joining partners with the United Way of Massachusetts Bay (UWMB), the IDA Program we've created has distinct features that cater to the needs of TAFDC families who are interested in gaining vocational skills. The program is being offered in 11 TAOs located within 64 communities across the state. (It will be made available in the Brockton, Dorchester, Framingham, Lawrence, Lowell, Malden, Milford, Newmarket Square, North Shore, Plymouth and Revere TAOs.)

Once our Department determines that someone qualifies for an IDA referral, he or she will meet with a UWMB representative who will explain the program in detail and determine eligibility. After a client is determined eligible, a detailed Savings Plan Agreement is completed so that a savings account can be created. UWMB representatives will help our clients decide on the appropriate vocational educational training program and the amount of money equal to the cost of the training (up to \$2,000) that needs to be saved before attending this training. The client's savings will be matched by our Department as well as UWMB. For example, if the cost of an

approved vocational educational program and a TAFDC parent's total contributions amount to \$2,000, a combined total of \$4,000 will be contributed by our Department and the United Way. This means that a TAFDC family can save up to \$6,000 by taking advantage of the IDA Program for Educational Advancement.

On a more personal and bittersweet note, as you know I will be soon leaving Massachusetts to head up the state of California's Department of Social Services. In fact, this will be my last column in *Transitions*. From the first day I arrived at DTA, I have been nothing but proud of the agency and the work that we do. We have some of the finest employees across state government, providing critical services and supports to so many of the most vulnerable residents of our Commonwealth. Each and every day, you have done that with precision and compassion, helping hundreds of thousands of families move to a better place economically. The past five years as your Commissioner has been one of the most rewarding times of my life.

With gratitude and respect,



John Wagner



COMMUNICATION is the KEY

Quality Corner

This month we will review an error related to shelter expenses.

Shelter Deduction Error

This case involved a mother, her daughter and the daughter's child who were in one NPA FS AU.

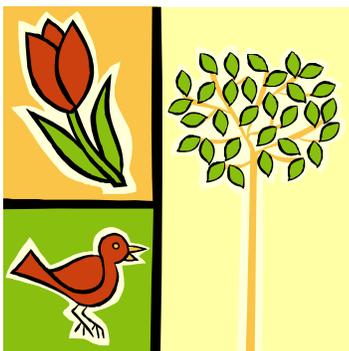
The mother was the grantee of the FS AU. The daughter and her child were also TAFDC recipients. The grantee's rent was correctly used as the FS shelter expense. The daughter had been paying her mother \$75 each week as her portion of the rent, which prevented an income-in-kind deduction from her TAFDC grant. However, the daughter's rent was not allowed as a shelter deduction in the FS AU since the mother was being credited with the total rent and utility expenses for the AU.

When the daughter turned 22-years-old and no longer had to be in the same FS household with her mother, an FS AU was established for her and her son. She also continued to receive TAFDC benefits. She was now entitled to the shelter expense of \$324.98 ($\75×4.333) that she paid to her mother. QC determined that the shelter deduction should have been allowed since it was correctly reported and verified. This resulted in an underissuance error.

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What's an AU Manager to Do?

Whenever there is a change in household composition, the AU Manager must review all eligibility factors before wrapping up the AU for authorization. In this AU, the income and household size were correctly changed, but the Shelter Expenses window needed more attention. When processing an AU containing an AU member who was a part of another AU, it is important to make sure that both the original AU and the newly established AU are correct. The AU Manager should have changed the 'Countable for FS' radio button to 'Yes' so that the \$75 weekly rental amount would in fact be allowed in the calculation of the shelter deduction for the AU.



From the Hotline

- Q.** A father with over five years of Legal Permanent Resident status has been receiving food stamp benefits and TAFDC. He lives with his two children. One of his children has an eligible noncitizen status but was recently taken out of the TAFDC AU because she is 18-years-old. The other child is only ten years old, but he doesn't have an eligible noncitizen status for either TAFDC or the Food Stamp Program. Can I leave the father on TAFDC as an open AU consisting of one individual?
- A.** Yes. An otherwise eligible grantee, whose only dependent child is ineligible due to noncitizen status, is eligible to receive TAFDC as an AU of one.
- If otherwise eligible, the father and the 18-year-old eligible noncitizen child may continue receiving food stamp benefits as an AU of two.
- Q.** A TAFDC grantee's former boyfriend has recently left the home, and the grantee is now caring for his disabled child, even though she is not related to the child. This disabled child is not receiving TAFDC, but two of the grantee's children are members of the AU. The grantee is claiming the caretaker exemption. To qualify as an exempt AU, must there be a relationship between the TAFDC grantee and her former boyfriend's child?
- A.** No. As long as the caregiver meets the other requirements of this exemption, no relationship is necessary between the caregiver and the disabled child. However, other requirements may apply in order to meet this exemption. Refer to 106 CMR 203.100 (A) for further details.
- Q.** A disabled EAEDC applicant who met with me this afternoon handed me a completed Emergency Aid to the Elderly, Disabled and Children Medical Report signed by a certified physician who qualifies as a competent medical authority. However, this physician is not a MassHealth provider. Is this medical report still acceptable?
- A.** Yes. While the applicant must provide a completed Emergency Aid to the Elderly, Disabled and Children Medical Report signed by a competent medical authority, the regulations at 106 CMR 320.200 do not specify that a MassHealth provider is required. A Medical Report completed by an individual who meets the definition of competent medical authority as specified at 106 CMR 701.600(H) is acceptable.

From the Forms File

Revised Form

15-042-0407-05

CTC (Rev. 4/2007)

Checklist for Transfer AUs

The *Checklist for Transfer AUs* has been revised and now includes a checkbox for American with Disabilities Act (ADA) accommodations. TAOs must discard the old version and use the revised *Checklist for Transfer AUs*.

EA - S2H Toolbox Relocation Initiative

EA

Field Operations Memo 2007-27

The *S2H (Shelter to Housing) Toolbox Relocation Initiative* program will provide a payment of \$6,000 for an EA family to move from shelter into permanent, unsubsidized housing. To be considered for the program, the EA family must have been residing in a DTA temporary emergency shelter on or before February 28, 2007 and must have income sufficient to maintain the rent on the unsubsidized unit. This program will end on June 30, 2007.

EAEDC: Rest Homes Per Diem Rate Changes

EAEDC

Field Operations Memo 2007-28

The Division of Health Care Finance and Policy (DHCFP), the state agency that sets payment rates for residential care facilities, issued new per diem rates for Massachusetts rest homes, effective March 1, 2007. Additionally, DHCFP approved a **special adjustment rate** to provide additional funding to rest homes to cover the period from January 1, 2007 through February 28, 2007. With every rate change, AU Managers must recalculate the EAEDC benefits for each recipient residing in the rest home, using the rest home's new rate.

This memo:

- identifies EAEDC recipients whose per diem rate has changed and the corresponding rate changes that need to be made in BEACON;

- provides instructions on how to change per diem rates in BEACON and recalculate EAEDC benefits as a result of the rate change; and
- provides instructions on how to manually calculate a **special adjustment rate** retroactive from January 1, 2007 through February 28, 2007.

EA Noncompliance Decisions and Notices

EA

Field Operations Memo 2007-29

Effective April 27, 2007, the Noncompliance Committee will no longer be responsible for completing and mailing the TES-WN-13 and the NFL-ST to the EA family. The AU Manager/Homeless Coordinator will now be responsible for completing and mailing the TES-WN-13 and the NFL-ST to the EA family.



“Discipline is the servant of inspiration.”

Bebe Moore Campbell

The Mass 2-1-1 Program: Changing the Way to Find Help

All
Field Operations Memo
2007-30

This memo alerts all staff to the new phone communication system in Massachusetts called *Mass 2-1-1*. *Mass 2-1-1* is mirrored after the 9-1-1 system (emergency assistance) and/or the 4-1-1 system (information). The 2-1-1 phone number is used for *non-emergency information and referral services*. The 2-1-1 call center is staffed by trained specialists who assess the callers' needs and refer the callers to the help they seek.

Verifications

All
A User's Guide: Transitional Assistance Programs and BEACON Update 074

This User's Guide Update transmits detailed information about the format of the revised BEACON-generated Verification Checklist (VC-1). In addition, this update outlines procedures for processing FS applications that are denied on Day 30 for **failure to submit verifications** when the applicant subsequently submits the missing

verifications within the next 30-day period. The procedures are also applicable to food stamp recipients whose certification periods have expired but who complete their recertification within the next 30-day period.

FYI

ADA Accommodations

When an AU is transferred from one AU Manager to another in the same TAO or when an AU is transferred to another TAO, it is important to be aware of any existing ADA accommodations. The *Request for an ADA Accommodation* form, filed in the AU record, must be stored in a prominent place in the AU record prior to transferring the AU. In addition, the AU Manager must include this information on the Narrative Tab in BEACON as a **new** narrative before transferring the AU to another AU Manager or to a new TAO. The AU Manager must also use the yellow sticky note feature to alert a new AU Manager about the ADA accommodation. If the AU is being transferred to another TAO, complete the *Checklist for Transfer AUs (CTC)*. This form has been revised to include a checkbox for ADA accommodations.

FYI

The BEACON-Generated Signature Pages for Cash/FS and FS-Only Applications

Prior to BEACON Increment 2.1.22, TAFDC/FS as well as FS-only applications generated the same signature page. However, language contained in certain paragraphs of the old signature page did not apply to FS-only applications. To address this issue, separate signature pages for TAFDC/FS applications and FS-only applications were created.

Since FS regulations do not require the AU Manager's signature on FS applications, the revised FS-only signature page does not include an AU Manager signature line.

The AU Manager's signature is required on cash program applications; therefore, the AU Manager signature line was retained on the revised TAFDC/FS signature page. However, the AU Manager's name no longer prints below the signature line.

The omission of the AU Manager's name was unintentional. This omission was identified by TAO staff through the Help Desk. Replacing the AU Manager name will require a BEACON Increment.

FYI

BEACON Online Help Update Issued in April 2007

BEACON Online Help Update Issue# 8 (04/24/07)

FYI

Changes to DTA Online

This month you will see the following changes to DTA Online:

Diversity

- **Events**

The list of available options includes a link to **Diversity Day 2007**. When selected, a PowerPoint Presentation of the events that took place on Diversity Day 2007 appears.

- **Frequently Asked Questions**

The list of available options includes a new link entitled **Frequently Asked Questions**. When selected, a list of diversity-related questions and answers is displayed on hrconnects.us.

Legal - Functions/Services We Provide

The list of available options includes the following topics:

- **FFY07 - Annual Internal Control Certification** -When selected, a memo from Thomas Noonan, General Counsel, to DTA's Executive Staff is displayed. This memo provides an overview of what must be done in order for the Department to be in compliance with the Commonwealth's Internal Control Law. In addition, there are links to the following attachments:

- *FFY07 - Annual Internal Control Standards*
- *FFY07 - Instructions for Writing Procedures*

- *FFY07 - Certification Form*
- *FFY07 - Standards for Procurement - Contract/ISA Process, Contract Management and Invoice Processing - General Counsel's Audit/Review Memo dated March 5, 2007*

- **Internal Control Unit (ICU)**
When selected, a description of the functions and responsibilities of the ICU appear.

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Y

FYI

Changes to the EOHHS Mass.gov DTA Homepage

The EOHHS Mass.gov DTA Homepage has been redesigned and includes new options that link to revised and new information. Provided below is a summary of the changes to the DTA homepage.

LEFT SIDE OF PAGE

- **What We Do**

The following options appear under the header What We Do:

Food Assistance
Job Assistance
Cash Assistance
Emergency Shelter
Domestic Violence

When selected, each option provides additional information as well as links to other sources of information.

- **Key Resources**

The list of options has been reordered and includes links to the Department of Revenue and to the Department of Early Education and Care.

CENTER OF PAGE

- **Welcome From Commissioner John Wagner**

Commissioner Wagner's welcome message provides an

overview of the programs administered by the Department and encourages visitors to the site to explore the information available there about DTA's programs.

- **About the Department of Transitional Assistance**

About the Department of Transitional Assistance provides an overview of the Department, including an overview of the Transitional Assistance Offices and Central Office. In addition, also included is a link to DTA's organizational chart.

FYI

Electronic Validation of Identity

Social Security number validation by SVES electronic inquiry is considered acceptable verification of identity for **all** department programs.

This means that if an EBT card was not issued on Day 1 because identity was not verified by the applicant, the AU Manager must issue an EBT card as soon as the applicant's Social Security number has been electronically verified through SVES. Additionally, AU Managers must not delay processing expedited service to an eligible food stamp applicant if the SVES overnight inquiry positively verifies the applicant's Social Security number.

FYI

Prison Match

Centralized Eligibility Operations (CEO) has recently modified the processing of the Prison Match. LOQC staff will no longer review AUs listed on various prison interfaces received in CEO. Processing will be handled entirely by CEO, including requests for verifications and/or the resultant AU closing or reduction. Actions taken by CEO will be noted on the BEACON Narrative Tab, and the AU Manager and the appropriate TAO Assistant Director will be notified of the action via e-mail. If the action is appealed, the verifications received will be faxed, on request, to the AU Manager acting as the Department representative at the hearing. Questions related to this process can be directed to Sue Mathias, CEO Match Unit Supervisor at 617-348-5397.

FYI

TAFDC for Applicants and Recipients with Ineligible Dependent Children

A TAFDC applicant or recipient whose only dependent child is ineligible for TAFDC due to his or her noncitizen status, is eligible to receive TAFDC as an AU of one, providing the grantee is otherwise eligible for TAFDC. In a two-parent AU, both parents are eligible if both parents are otherwise eligible for TAFDC. This month's "From the Hotline" column contains a Q & A correction on this topic.

A policy clarification will be issued.

FYI

Types of Non-Countable Reimbursements and Income

As a result of a recent Quality Control error, AU Managers are reminded that pay information can vary greatly and requires careful review. In some instances, the gross pay listed contains reimbursements that may be non-countable and should be disregarded from the gross income. These reimbursements can be for past or future expenses, and may be for travel, uniforms and transportation costs to and from a job or training site. They may be disregarded to the extent that they do not exceed the actual expense incurred and do not represent a gain or benefit to the AU. In the TAFDC and EAEDC programs, these non-countable reimbursements are for educational and/or training expenses only. For details on excluded reimbursements, see 106 CMR 204.250(I) (TAFDC), 106 CMR 321.250(I) (EAEDC) and 106 CMR 363.230(F) (Food Stamps).

The Earned Income Tax Credit (EITC) and flexible credits are also types of non-countable income. The EITC is considered as a countable asset for TAFDC (106 CMR 204.120(I)) and EAEDC (106 CMR 321.120(I)) and as a non-recurring lump sum payment countable as an asset in the month received for the Food Stamp Program (106 CMR 363.230(I)). Flexible credits have previously been discussed in an FYI in *Transitions* in January 2006.

Questions related to reimbursements or other types of non-countable income should be referred to the Policy Hotline.

FYI

Verifications Due View

The Daily Priority Actions group consists of 16 views that must be reviewed each day by the AU Manager to ensure timely follow-up. These activities are critical to accurate AU processing. One of the Daily Priority Actions is the Verifications Due view; this view is particularly important to AU Managers unfamiliar with an AU, as it identifies applicants and recipients who have outstanding verifications and outstanding external agency match information. This view also provides the date the verification checklist or external match-related letter was sent, and the date the verifications or external match information are due. AU Managers are reminded to use this view to see if there are any outstanding verifications or if there is any unresolved match information for an AU.

