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## Quality Corner

This month we will review two errors that occurred in NPA cases. Both errors are linked to shelter expenses.

### **Incorrect Response to Utility Questions**

On March 25, 2015 the client returned a recertification form for an April 2015 recertification. On the recertification form, the household reported receiving SSI of \$763.40 and paying rent of \$198 monthly. Consequently, the household was approved for \$169 in SNAP benefits. Prior to recertification, the household derived the heating/cooling SUA from H-EAT benefits. The H-EAT benefit would have expired on April 30, 2015. During the March recertification, the household was credited with the heating/cooling SUA based on a Yes answer to the *pay share heating costs* question on the SUA page.

At the August 2015 Quality Control review, it was determined that the client continued to receive \$763.40 in monthly SSI benefits; the client's rent had increased to \$206; all utilities had been and continued to be included in the rent. When the benefit was recalculated with the correct rent and SUA, the client was only eligible to receive \$16 in SNAP benefits. The incorrect response to the *pay share heating costs* question caused a misapplication of the SUA and an overissuance error of \$153 for the review month (August 2015).

### **What's a Case Manager to Do?**

When a case manager receives a preprinted recertification form, he or she must review the form to identify changes. In the SUA section of the form, the record indicated that the client received H-EAT benefits. However, this record should have had no bearing on the answer the worker entered to the *pay share heating costs* question on the SUA page. By incorrectly answering yes to the *pay share heating costs* question on the SUA page, the case was not reselected for H-EAT benefits as the information on BEACON indicated that the client paid heating/cooling expenses.

The SUA page is designed to receive answers to the utility questions. Based on these answers, BEACON determines which, if any, of the SUA types the household is entitled to receive. The only responsibility case managers have for the SUA page is to enter the answers the client provides. The incorrect answer to the utility question regarding heating costs caused an overpayment error, a potential repayment obligation for the household and a missed opportunity for the household to be reselected for H-EAT benefits. For more information on H-EAT Benefits, please refer to the Online Guide, SNAP, Expenses and Deductions, Household Expenses, Heat and Eat.

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## Quality Corner *(Continued from Page 2)*

### **Incorrect Subsidized Rent**

On June 15, 2015, the client returned an Elderly/Disabled prefilled Recertification form for a July recertification. She reported receiving income of \$1104 in RSDI, rent of \$750 and indicated no changes in circumstances. The client was credited with the heating/cooling SUA. Based on this information, the recertification was approved for \$182 per month in SNAP benefits.

During the August 2015 Quality Control Review, the QC reviewer determined that client continued to receive \$1104 in RSDI benefits. However, the QC review identified that the client had a housing subsidy for the past five years and was responsible for only \$139 per month in rent. A review of the preprinted recertification form, Section 7, showed that the client resided in subsidized housing. After a recalculation of SNAP benefits using the correct shelter expenses, the client was eligible for the minimum SNAP benefit of \$16. The incorrect shelter expense caused an overpayment error of \$166 for the review month.

### **What's a Case Manager to Do?**

When a recertification form is received by a case manager, it must be reviewed in its entirety. Some clients do not complete department forms properly, so a careful review will at times prompt questions that provide clarification for the case record. This aids in accurate benefit calculation and helps to reduce payment errors. A subsidized rental amount of \$750 is 68% of the client's income. Most subsidized rents are less than 50% of the household's income. There may be a few exceptions but when a subsidized rent is more than half of the household's income, the information provided is questionable. A questionable rental amount is usually incorrect or it may be an indication that the client resides with others who also have income or the client has other income that is unknown to DTA. A questionable rental amount must be verified.



## From the DTA Policy/Procedure Mailbox

A “From the Hotline” Index of the questions and answers written in *Transitions* during 2015 has been compiled below. The Index is intended to provide quicker access to policy and procedural information. Please remember that this Index explains policy/procedure as of the month/year in which the questions and answers were issued.

<b>Emergency Aid to the Elderly, Disabled and Children Program</b>		
<b>Topic</b>	<b>Month</b>	<b>Related Procedure/Policy, 106 CMR:</b>
Domestic Violence	September	OLG, Cross Program >Heightened Level of Security
Hearings	May	343.450(B)

<b>Transitional Aid to Families with Dependent Children</b>		
<b>Topic</b>	<b>Month</b>	<b>Related Procedure/Policy, 106 CMR:</b>
Child care eligibility	November	207.210(A)(1)(c)
Disability exemption	July	203.100(A)
Domestic Violence, Good Cause Waivers	September	203.110
	September	OLG, Cross Program > Heightened Level of Security
Employment Development Plan	July	207.110
Exemptions from Time-Limited Benefits	July	203.100
	November	203.100
Good Cause Waivers	September	203.110
Group Orientations	November	TAFDC > Basic Case Activities and Maintenance > TAFDC Orientation
Hearings	May	343.450(B)
Learning Disability	October	TAFDC > Services > Learning Disabilities > Completing the Learning Disability Screening Page
Obtaining Benefits	June	701.220
Transportation Payments	June	OLG, TAFDC > Services > Transportation
	June	207.210(B)

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**From the DTA Policy/Procedure Mailbox** *(Continued from Page 4)*

<b>Supplemental Nutrition Assistance Program</b>		
<b>Topic</b>	<b>Month</b>	<b>Related Procedure/Policy, 106 CMR:</b>
ABAWD	December	OLG, SNAP > Work Requirements > ABAWD Work Program Requirement
Domestic Violence	September	OLG, Cross Program > Heightened Level of Security
Elderly/Disabled	February	361.210
	March/April	Operations Memo 2011-29 and Operations Memo 2012-55
	August	361.210
Expense, dependent care	June	364.400(D)
Expense, medical	February	364.400(C)
	February	SNAP Medical Deductions Job Aid
	August	SNAP Medical Deductions Job Aid
	August	364.400(C)
Hearings	May	343.450(B)
Narrative	May	OLG, SNAP > Business Process Redesign (BPR) > BPR Overview > Narrative Guidelines Overview
Residency	March/April	Operations Memo 2013-34, 362.100
Verification of Residency	March/April	362.120
Verification of Medical Expenses	August	Operations Bulletin 2015-2

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## Online Guide Transmittals

### SNAP– ABAWD Work Program Requirement

Online Guide Transmittal 2016-1  
SNAP

This Online Guide Transmittal informs staff of multiple updates pertaining to ABAWD clients. New pages explain community service responsibilities and clarify that BEACON automates work program sanctions (or strikes), with the exception of out-of-state strikes, which must be entered manually.

When a homeless client responds to screening questions with two or more trigger answers, s/he will become exempt from the ABAWD Work Program (WP) requirement. Additionally, a homeless client that indicates s/he does not have a stable nighttime residence will become exempt from the ABAWD WP requirement.

Certain verifications are required to verify ABAWD WP exemption or compliance, but are not mandatory for case processing.

### Cross Program: The Assisting Person Page

Online Guide Transmittal 2016-2  
All

This Online Guide Transmittal advises staff of changes to the Assisting Person page and transmits the revised Image 10 and the new Image-10 A forms.

- The Assisting Person page has been revised to require certain fields based on the role the person is designated to perform. Name, gender and relationship are required for all Assisting Person roles. A social security number is no longer required for any role. A soft edit will inform the user if an outstanding field is required.
- The Authorized Representative form (Image-10) has been revised. The Image-10 form is used to designate a family member, friend or neighbor who the client chooses to play an assisting role.
- The new Image-10A form is used to assign an agency such as a group home, as the authorized representative. This form requires the federal tax identification number (FEIN) of the designated agency.

### Cross Programs – Customer Concerns Pages

Online Guide Transmittal 2016-3  
All

This Online Guide Transmittal informs staff of the requirement to accept, document, and resolve all concerns made by applicants, clients, family members, and other DTA stakeholders. These concerns must be logged in the Customer Concerns page in BEACON. Reports are generated from the data input in this page and are analyzed to determine whether there is a pattern of concerns that can be addressed.



## Online Guide Transmittals

### SNAP: Streamlining the Processing of Expedited and Ongoing Benefits

Online Guide Transmittal 2016-4  
SNAP

BEACON Build 48.2, implemented on January 4, 2016, includes changes to the processing of expedited and ongoing SNAP benefits:

- The Immediate Needs questions in BEACON will be auto populated with the responses annotated on a web application. This will include information to indicate whether the applicant self-screened and whether a case manager rescreened the applicant for expedited benefits.
- When approving a case for expedited SNAP benefits, case managers will be able to process both expedited and ongoing benefits with a single wrap-up **if** all verifications are provided.
- Currently when an applicant applies for SNAP and is eligible for expedited benefits, case managers must issue a VC-I for the expedited benefit requesting identity, if needed, and issue a second VC-I to request verifications to process the application. With the new functionality, case managers will be able to issue a single VC-I. This VC-I will request identity, with a due date that is 7 days from the date of application. The remaining items on the VC-I will be due on day-30.

### SNAP: Extension of Simplified Reporting Phase II: 12-Month and Six-Month Certification Periods

Online Guide Transitional Update 2016-5  
SNAP

To streamline the recertification process and simplify SNAP reporting requirements, the Department has expanded Simplified Reporting for nonpublic assistance (NPA) SNAP households. The first phase of this expansion was implemented in November 2015, for certain households eligible for a 24-month certification period (SIMP-24).

Effective with BEACON Build 48.2 two new certification types, Simplified Reporting-12 Months (SIMP-12) and Simplified Reporting-6 Months (SIMP-6) were created in BEACON. This change allows more households to be certified under Simplified Reporting rules.

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## Online Guide Transmittals *(Continued from Page 7)*

SIMP-6 households are those households that include at least one Able Bodied Adult Without Dependent (ABAWD) member. SIMP-12 households are households ineligible for SIMP-24 and SIMP-6 reporting. These households typically have earned income, mixed income types and/or mixed household composition.

Conversion occurred based on the rules specified below.

1. All Annual Reporting (AR) households will be converted to SIMP-12 SNAP. The certification end date will be unchanged.
2. All households certified as Recertification for 12 months and were recertified in the last 3 months (benefit ending October, November and December (partial)) were converted to SIMP-12, if there were no outstanding verifications, documents or Program Integrity Checklist items. These households retained their originally assigned end certification dates.
3. Households that were not converted on January 4, 2016 will be certified as the applicable Simplified Reporting certification type upon completion of their next recertification, if eligible. Newly certified households will be assigned the appropriate certification type upon the approval of SNAP benefits.

Simplified Reporting requires an Interim Report to be submitted at the end of the first half of the certification period, and a recertification form at the end of the certification period. Failure to submit either of these forms will result in the automatic closing of the case.

This Online Guide (OLG) Transmittal introduced SIMP-12, SIMP-6 and advised staff of Simplified Reporting conversion rules, reporting requirements and the Simplified Reporting process. Households certified as Transitional Benefit Alternative (TBA), Bay State CAP and Public Assistance (PA) SNAP households are excluded from Simplified Reporting.

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## Online Guide Transmittals *(Continued from Page 8)*

### **BEACON Enhancements for Accommodation Request Processing under the Settlement of *Harper, et al. vs. Massachusetts Department of Transitional Assistance***

Online Guide Transmittal 2016-6

TAFDC, EAEDC and SNAP

*Harper, et al. v. Massachusetts Department of Transitional Assistance (DTA)* was a class action lawsuit brought by disabled clients alleging that the Department violated the Americans with Disabilities Act by failing to provide disabled clients with equal access to Department benefits. Improving services to these clients is the objective of the settlement.

Effective with BEACON Build 48.2, which occurred January 4, 2016, enhancements were made to assist Client Assistance Coordinators (CACs) and other DTA staff to ensure the continued timely processing of accommodation requests. These enhancements include:

- a new BEACON-generated CAC appointment letter to replace the manual appointment letter;
- the removal of the Declination print button on the Accommodation/Special Assistance Request page, since the Declination form will no longer be required;
- a blue “CAC circle” in the Narrative tab to identify comments written by a CAC;
- two new BEACON views in the Accommodations view group to help staff inform clients with certain accommodations of impending negative actions and of expiring accommodations – Adverse Actions and Closed/Denied Assistance Units;
- The Denied/Expired Accommodations view is now known as the Expiring/Expired/Denied Accommodations view and now includes more information about accommodations that soon will expire or already have expired.

The Department is committed to ensuring that all applicants and clients have access to all benefits and services regardless of any disability.

### **TAFDC – Disability Evaluation Services (DES) Referral Address and Fax Number**

Online Guide Transmittal 2016-8

TAFDC

The Online Guide instructs staff to mail Learning Disability Assessment referrals to DES.

The address and a fax number have been added to the Online Guide to assist staff in making the Learning Disability Assessment referrals to DES.

## From the Forms File

### Revised Forms

*Image-10 (Rev. 12/2015)*

*16-020-1215-05*

*16-022-1215-05 (S)*

*Request to Choose Someone to Be My Authorized Representative*

Based on suggestions from the Forms and Notices workgroup, convened at the Commissioner's request and comprised of Field managers, the above form has been revised. Please destroy existing supplies of this form.

### New Form

*Image-10A (12/2015)*

*16-025-1215-05*

*16-026-1215-05 (S)*

*Request to Choose Someone to Be My Agency Representative for My SNAP Benefits*

Based on suggestions from the Forms and Notices workgroup, convened at the Commissioner's request and comprised of Field managers, the above form has been created. Please use the new form.

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## Diversity Quote

**If we cannot end now our differences, at least we can help make the world safe for diversity.**

**John F. Kennedy**

## TAO Meeting Notes