



Commonwealth of Massachusetts
Executive Office of Health and Human Services
Department of Transitional Assistance
600 Washington Street • Boston, MA 02111


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Lieutenant Governor

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RONALD PRESTON
Secretary

JOHN A. WAGNER
Commissioner

Field Operations Memo 2004-1
January 30, 2004

To:  **Transitional Assistance Office Staff**
From: **Cescia Derderian, Assistant Commissioner for Field Operations**
Re: **Automating the Disability Window**

Overview

The Department has automated the flow of information to the Disability Window received from PRO (DES) and SSA tape files thereby eliminating some of the manual steps currently required by the AU Manager (AUM). The new disability processing will begin 2/2/2004 and the AUM will see the results and data clean-up over the next few weeks (all of the batch jobs are not run at the same time). The new disability processing applies to EAEDC and TAFDC APs who are claiming a disability and reduces the work currently required by the AUM by:

- taking information from the PRO (DES) tape files to update information on the Disability Window on a weekly basis;
- automatically closing EAEDC AUs for appropriate reasons;
- automatically completing SSI referral and SSI appeal notices for appropriate reasons. These documents will be seen on the Document History Tab;
- creating reports identifying EAEDC or TAFDC AUs that require review;
- creating a report identifying EAEDC or TAFDC AUs whose medical reports were sent to PRO (DES) and have not had a decision rendered yet;
- automatically creating an entry on the Verifications Tab and entering a comment on the Narrative tab describing the update action taken by the system; and
- automatically recalculating food stamp benefits when EAEDC or TAFDC AP meets SSI disability criteria.

Complete procedures on the Disability windows and process will be issued shortly to update the BEACON User's Guide, Chapter XIII, Section H.

BEACON Update System Updates Pre-2/2/2004

- The system reviewed PRO (DES) and SDX tape file information to update the disability information and SSI tracking information on the BEACON Disability window in preparation for the new process.
- The system updated all EAEDC records in which the PRO (DES) tape file information does not agree with the information on BEACON, unless the BEACON information was more recent.
- Using PRO (DES) tape file information, the system updated all of the TAFDC records, when the PRO (DES) tape file showed a future expiration date.
- Using PRO (DES) tape file information, if the AP meets the SSI criteria, the system updated the Determination Source to “SSI Certified/Recipient” and recalculated the Food Stamp benefits, if applicable.

System Clean-up Post-2/2/2004

A clean-up phase of this project will begin after 2/2/04 by identifying EAEDC AUs that have incomplete, outdated medical information or SSI application information is missing.

- The system will send the Medical Report and Disability Supplement to active EAEDC APs when:
 - the Expiration Date has passed;
 - the disability claim was denied and the AP is still EAEDC active;
 - a Medical Report was sent and no response is recorded.

The mailing of the Medical Reports and Disability Supplements will start in the first week of February and be staggered over a 6 to 8 week period. Every week a report will be generated to the TAOs listing the names of the APs who were sent the Medical Report and Disability Supplement.

- The system will send an SSI referral notice to:
 - EAEDC APs to apply for SSI, excluding noncitizens who do not meet SSI noncitizen criteria, when PRO (DES) tape files shows APs who meet SSI criteria but no SSI application is recorded on SDX.
 - nondisabled EAEDC APs who are age 65 or more and appear to meet the SSI noncitizen criteria.

The mailing of the SSI referral notice will start in the first week of February and be staggered over a 6 to 8 week period. Every week a report will be generated to the TAOs listing the names of the APs who were sent the SSI referral notice.

Reports

Three new weekly reports found in the Match folder in Actuate have been created to identify AUs that require AUM review:

- “*TAFDC Disability Reviews Needing AU Manager Review*,” notifies the AUM that PRO (DES):
 - denied the TAFDC AP’s disability claim, or
 - approved a disability claim for the TAFDC AP.The AUM must reevaluate the TAFDC work program requirement and AU exemption status, entering appropriate information on the TAFDC tab of the Work Requirements window.
- “*EAEDC SSI Denial Requiring AU Manager Review*,” notifies the AUM that SSA has denied SSI benefits for EAEDC APs for reasons (nondisability related reasons) that require review. These reasons include: SSI denials for inmates, employment, fleeing felons, resources, age, legal U.S. residence and administrative sanctions. The AUM must take any appropriate action.
- “*PRO Disability Reviews (EAEDC and TAFDC)*,” notifies AUM or TAO Disability Liaisons weekly of pending disability reviews, Medical Reports or Disability Supplements returned to the TAO by the AP and entered with Report Returned Date have not been received by PRO (DES), and Medical Reports or Disability Supplements returned to the TAO by PRO (DES) because the information is incomplete.

Four new EAEDC system-generated notices have been created for the new disability processing:

Notices

- Closing notice for failing to apply for SSI benefits (Attachment A);
- Closing notice for failing to cooperate with SSI application process (Attachment B);
- Referral notice to apply for SSI when the AP appears to meet SSI disability criteria (Attachment C); and
- Referral notice to appeal SSI denial along with an insert on how to appeal the SSI denial. (Attachment D).

**New
Procedures for
the Disability
Window**

The current procedures	The new procedures as of 2/2/04
<p>AUM manually enters PRO (DES) information and uses the DES Decision to identify when the disability was approved or denied.</p>	<p>The system:</p> <ul style="list-style-type: none"> - receives disability information from PRO (DES) tape files and updates the Disability windows on the EAEDC or TAFDC AU, - terminates the EAEDC AU if appropriate; - for FS AUs, lifts the FS shelter cap, recalculates FS benefits and sends notice; and - creates a report for the AUM to review the TAFDC work program requirements and the AU exemptions status.
<p>AUM initiates the EAEDC AU closing if PRO (DES) denies the disability claim.</p>	<p>The system automatically initiates and authorizes a closing transaction of the EAEDC AU.</p>
<p>AUM updates the Physical/Mental Disability Tab and the Determination Source.</p>	<p>The system automatically updates the information in BEACON to the EAEDC or TAFDC AU by using information from the weekly file from PRO (DES) tape files.</p>
<p>AUM refers the AP to SSA to make an appointment to complete an SSI application.</p>	<p>The system automatically sends a referral notice to EAEDC AP to apply for SSI when the EAEDC AP:</p> <ul style="list-style-type: none"> ▪ meets an SSI disability standard; ▪ has a cumulative disability equal to 12 months or more and there was no referral in the past year; ▪ turns age 65 or is over age 65 at (re)application); ▪ has a change in citizenship status and starts to meet the SSI noncitizenship rule.

**New
Procedures for
the Disability
Window
(continued)**

The current procedures	The new procedures as of 2/2/04
AUM manually monitors SSI application status.	The system automatically updates information in BEACON from the SDX file which will be used to: <ul style="list-style-type: none"> ▪ verify the SSI application status; ▪ close the EAEDC AU and send notice for failure to apply for SSI benefits or failure to cooperate with SSI application process. If pending SSI application does not show on SDX within 40 days, the EAEDC AU will be closed; if pending SSI application does not show on SDX within 75 days and EAEDC AU is active (first closing was pulled), the EAEDC AU will be closed.
AUM reviews SDX for SSI denials.	The system checks SDX for SSI denials for certain reasons and will automatically send a notice to EAEDC AP to appeal the denial as a condition of EAEDC eligibility.
AUM or TAO Disability Liaison logs the Medical Report and Disability Supplement in a manual log or a stand-alone application.	The system automatically updates this information in BEACON on the EAEDC or TAFDC AU from the weekly PRO (DES) tape file and creates a report of all pending and incomplete disability reviews at PRO (DES).
AUM or TAO Disability Liaison completes the sent date on the Review Tracking tab.	The system automatically updates this information in BEACON on the EAEDC or TAFDC AU from the weekly PRO (DES) tape file.
AUM or TAO Disability Liaison logs the results of the review and updates the Review Tracking tab.	The system automatically updates this information in BEACON on the EAEDC or TAFDC AU from the weekly PRO (DES) tape file and creates a weekly report of all pending and incomplete disability reviews at PRO (DES). This eliminates the TAO log.

**Remaining
Manual
Procedures**

While many of the manual procedures previously performed by the AUM have been automated there are some manual procedures that have not been changed. The unchanged manual procedures include:

- the AP claims a disability, the AUM gives him or her a Medical Report and/or Disability Supplement* to be completed;
- the Medical Report and/or Disability Supplement* is not received by the due date, the AUM closes or denies the EAEDC AU;
- a disability duration that is less than 60 days, the AUM closes or denies the EAEDC AU;
- for EAEDC, a disability duration is between 60 and 90 days, the Medical Report/Disability Supplement is not sent for a disability review;
- the AUM gives the Medical Report and/or Disability Supplement* to the TAO Disability Liaison;
- the AUM or TAO Disability Liaison mails the Medical Report and/or Disability Supplement* to PRO (DES);
- the AUM or TAO Disability Liaison gives the Disability Determination Tracking Form to the AUM;
- the EAEDC AP who is applying for SSI as disabled or over age 65 completes the AP-SSI/1 or 1A form. The AUM selects the yes radio button on the AP-SSI Form Signs field and enters the Signed Date on the SSI Tracking Tab of the Disability window. This information creates a referral on the SSI Tracking Tab and generates the SSI referral notice;
- the AUM completes the Accident window if the disability is a result of an accident or employment claim.

*EAEDC AP gets Medical Report and Disability Supplement and TAFDC AP gets the Disability Supplement.

**Disability
Window**

The following describes the changes to the Disability window. No changes were made to the Report Result Tab.

On the Physical/Mental Disability Tab, the following fields are removed:

- Determination Date
- Other Determination Source
- Report to Client Date
- Report Complete radio buttons
- Completeness Date
- Review Required Date

On the Review Tracking Tab, the following changes occurred:

- Information, except for “Priority,” was updated automatically from the file received from PRO (DES)
- Date Sent was changed to Date Received
- Other Reason field and Clear Referral button were removed
- PRO Status field was added

• On the SSI Tracking Tab (formerly the Referral Tab), the following new fields regarding the SSI application are only updated by the SDX information:

- Application Status
- Application Date
- Payment Status
- Denial/Closing Date
- Appeal Status
- Appeal Date
- Interim Assistance Status

Questions

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

Attachment A

FAILURE TO APPLY FOR SSI BENEFITS

One Davis Square
Somerville, MA 02144

Important Notice - Read Carefully
Este Mensaje Es Importante - Lea Cuidadosamente

Massachusetts Department of Transitional Assistance

Mary Jones
101 Main Street
Somerville, MA 02145

999-99-9999
Davis Square TAO

02/06/2004

Dear Mary Jones:

The Department will stop your EAEDC benefits on 02/27/2004 because you did not apply for SSI benefits.

Your food stamp benefits will go to \$138.00 on 03/14/2004 because your countable income for food stamp purposes has changed.

A worker in the food stamp unit will handle your food stamp case. Your certification period is from 03/14/2004 through 09/13/2004. To keep getting food stamps you must file a new application by 08/28/2004. You will also have to come in for an interview and give us all the proof we need to decide if you are still eligible. If you do nothing, your food stamp benefits will stop.

The regulation(s) used in reaching these decisions are 106 CMR: 320.200, 364.500, 364.600, 365.170.

Please call your worker Mary Smith at 617-628-9999 if you have any questions about your case.

To ask about free legal services, call: Greater Boston Legal Services at 800-323-3205.

Attachment B

FAILURE TO COOPERATE WITH SSI APPLICATION PROCESS

One Davis Square
Somerville, MA 02144

Important Notice - Read Carefully
Este Mensaje Es Importante - Lea Cuidadosamente

Massachusetts Department of Transitional Assistance

Mary Jones
101 Main Street
Somerville, MA 02145

999-99-9999
Davis Square TAO

02/06/2004

Dear Mary Jones:

The Department will stop your EAEDC benefits on 02/27/2004 because you did not cooperate with the SSI application process.

Your food stamp benefits will go to \$138.00 on 03/14/2004 because your countable income for food stamp purposes has changed.

A worker in the food stamp unit will handle your food stamp case. Your certification period is from 03/14/2004 through 09/13/2004. To keep getting food stamps you must file a new application by 08/28/2004. You will also have to come in for an interview and give us all the proof we need to decide if you are still eligible. If you do nothing, your food stamp benefits will stop.

The regulation(s) used in reaching these decisions are 106 CMR: 320.200, 364.500, 364.600, 365.170.

Please call your worker Mary Smith at 617-628-9999 if you have any questions about your case.

To ask about free legal services, call: Greater Boston Legal Services at 800-323-3205.

REFERRAL TO APPLY FOR SSI

One Davis Square
Somerville, MA 02144

Important Notice - Read Carefully
Este Mensaje Es Importante - Lea Cuidadosamente

Massachusetts Department of Transitional Assistance

Mary Jones
101 Main Street
Somerville, MA 02145

999-99-9999
Davis Square TAO

02/02/2004

Dear Mary Jones:

The Department has determined that you may meet the requirements to apply for Supplemental Security Income (SSI) benefits. To remain eligible to receive EAEDC benefits, you must apply for SSI.

Call the Social Security Administration (SSA) office at 1-800-772-1213 to schedule an appointment and to locate the SSA office closest to you.

If you do not apply for SSI benefits your EAEDC benefits will stop. You will receive a separate notice if your benefits are going to stop.

If you have any questions about this notice, you should call 617-629-9999 and ask for your worker Mary Smith.

REFERRAL TO APPEAL SSI DENIAL

One Davis Square
Somerville, MA 02144

Important Notice - Read Carefully
Este Mensaje Es Importante - Lea Cuidadosamente

Massachusetts Department of Transitional Assistance

Mary Jones
101 Main Street
Somerville, MA 02145

999-99-9999
Davis Square TAO

02/02/2004

Dear Mary Jones:

The Department has been notified that your application for Supplemental Security Income (SSI) has been denied. To remain eligible to receive EAEDC benefits, you must appeal this denial.

The denial notice you received from the Social Security Administration gives you information about how much time you have to file an appeal and how to appeal. A summary of that information is included with this notice.

Remember, if you do not file an appeal your EAEDC benefits will stop. You will receive a separate notice if your EAEDC benefits are going to stop.

If you have any questions about this notice, you should call 617-629-9999 and ask for your worker Mary Smith.

HOW TO APPEAL YOUR SSI BENEFITS DENIAL

Here is what you must do to appeal your denial of SSI benefits.

You must file a “Request for Reconsideration.” This can be done over the telephone or at the Social Security Administration (SSA) office. You have 60 days from the day you receive your SSI benefits denial notice to file an appeal. This time may be extended if you show SSA you have good cause for not meeting this time limit. The SSA staff person will discuss this with you and, if necessary, schedule an appointment with you to come to the SSA office to file the “Request for Reconsideration.”

Call the Social Security Administration telephone number on your SSI denial notice and speak to a staff person about appealing the denial decision.