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Executive Office of Health and Human Services
Department of Transitional Assistance
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Field Operations Memo 2005-21
April 11, 2005

To: Transitional Assistance Office Staff
From:  Cescia Derderian, Assistant Commissioner for Field Operations
Re: Resumption of the Automated EAEDC/SSI Referral/Closing Process

Background

In February 2004, the Department automated the Disability window. As part of this automation, BEACON began closing EAEDC AUs for:

- not applying for SSI, and
- not appealing an SSI denial.

In May 2004, the Department stopped the automated closings of these AUs in order to implement a warning notice informing these AUs about the potential closing before it took place.

With Increment 2.1.14 of BEACON, the automated closings will resume with warning notices (Attachments A and B) being generated before the potential closings. The applicant will be tracked on the SSI Tracking tab of the Disability window for **both** SSI applications and appeals for SSI denials.

It is expected these warning notices will start being generated on or after April 15, 2005.

**The Automated
EAEDC/SSI
Referral
Process:
Applications**

The applicant will be tracked on the SSI Tracking tab of the Disability window for SSI applications. The information on this tab is updated from the SDX Batch Job.

Effective with Increment 2.1.14 of BEACON, the automated EAEDC/SSI Referral process for applications is as follows:

- BEACON-generated referral to apply for SSI;
 - **30 days** from the date of the referral notice, if no application has been made (either updated from the SDX Batch Job or the recipient has not brought in proof of the application) a warning notice (Attachment A) will be sent to the recipient informing him or her that:
 - ◆ no application has been made;
 - ◆ he or she must do so and/or bring in proof that an application was made or an appointment scheduled; and
 - ◆ failure to do so may result in the AU being closed.
- Note: Recipients must be told that proof of an appointment does not stop the automated process. An application must be completed to stop this process.**
- if an application still has not been made **65 days** from the date of the referral (either updated from the SDX Batch Job or the recipient has not brought in proof of the application), the same warning notice will be resent; and
 - **75 days** from the date of the referral, if no application has been made (either updated from the SDX Batch Job or the recipient has not brought in proof of the application) the AU will be closed automatically by the System. **No AU Manager intervention is required.**

IMPORTANT: At any time during this process, if a recipient provides proof of the completed application, see the “TAO Director Override” section of this memo to prevent any warning notices being generated or any closings from occurring incorrectly.

**The Automated
EAEDC/SSI
Referral
Process:
Appeals**

The applicant will be tracked on the SSI Tracking tab of the Disability window for appeals for SSI denials. The information on this tab is updated from the SDX Batch Job.

Effective with Increment 2.1.14 of BEACON, the automated EAEDC/SSI Referral process for appeals is as follows:

- BEACON-generated notice to appeal SSI denial;
 - **30 days** from the date of the notice, if no appeal has been made (either updated from the SDX Batch Job or the recipient has not brought in proof of the appeal), a warning notice (Attachment B) will be sent to the recipient informing him or her that:
 - ♦ he or she did not cooperate with the appeal process;
 - ♦ he or she must do so and/or bring in proof that an appeal was made; and
 - ♦ failure to do so may result in the AU being closed.
- Note: An appeal must be filed to stop this process.**
- if no appeal has been made **65 days** from the date of the notice (either updated from the SDX Batch Job or the recipient has not brought in proof of the appeal), the same warning notice will be resent; and
 - **75 days** from the date of the notice, if no appeal has been made (either updated from the SDX Batch Job or the recipient has not brought in proof of the appeal) the AU will be closed automatically by the System. **No AU Manager intervention is required.**

IMPORTANT: At any time during this process, if a recipient provides proof of the filed appeal, see the “TAO Director Override” section of this memo to prevent any warning notices being generated or any closings from occurring incorrectly.

**AUs Not Closed
Between May
2004 and
Increment 2.1.14**

AUs who should have closed between May 2004 (when the automated closing process was stopped) and the implementation of Increment 2.1.14 for failure to apply for SSI or for failure to appeal an SSI denial, but who did not close shall have their AUs processed as follows:

- for anyone who has had an appeal or referral notice generated **at least 30 days prior** to the implementation of Increment 2.1.14, the automated process will resume; and
- the AU will then be automatically processed with the “Day 65” Warning Notice and the “Day 75” closing steps found on the previous pages.

No additional AU Manager intervention is necessary.

**TAO Director
Override**

In situations where proof of an application for SSI has been made or an appeal has been filed prior to **day 75**, the AU Manager must inform the AU Supervisor that proof of the recipient’s SSI Application or Appeal has been received. If the recipient brings in proof prior to day 75 of an appointment that will occur after day 75, the TAO Director must pull the closing following the procedures in this section. He or she must tell the AU Manager to keep a “tickler” file to ensure that the appointment is kept. If the appointment is not kept the AU Manager must close the AU following current procedures.

Note: For acceptable verifications of SSI Applications or Appeals, see *A User’s Guide*, Chapter XIII, Section H, page 23.

The AU Supervisor must then inform the TAO Director or Designee that there is proof of the recipient’s SSI Application or Appeal or proof of appointment beyond day 75.

The TAO Director or Designee must:

- go to the SSI Tracking Tab on the Disability window;
 - from the “Override Reason” drop down box, select either “Appointment,” “Application” or “Appeal.” If “Appointment” is selected, additional Warning Notices will be generated if appropriate and the automated closing will occur if proof of the application or appeal is not returned;
Note: This field is only selectable if there has been no current information from SDX.
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**TAO Director
Override
(continued)**

- enter the date of the appointment, application or appeal in the “Override Date” field; and
- authorize the override on the Interview Wrap-up window.

This will prevent warning notices from being generated inappropriately and prevent the automated closing from occurring.

Questions

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

Attachment A

LANGUAGE WITH VARIABLE TEXT (ENGLISH)

{BEACON_USER_STREET_ADDRESS} Important Notice - Read Carefully
{BEACON_USER_CITY_STATE_ZIP} Este Mensaje Es Importante - Lea Cuidadosamente

Massachusetts Department of Transitional Assistance

{RECIPIENT_NAME} {RECIPIENT_SSN}
{RECIPIENT_ADDRESS} {BEACON_USER_OFFICE_NAME}
{RECIPIENT_CITY_TOWN_STATE_ZIP} {MM/DD/YYYY}

Dear {GRANTEE}:

The Department recently sent you a letter telling you that you must apply for Supplemental Security Income (SSI) or your EAEDC benefits will stop. Our records indicate you may be eligible for SSI.

According to Social Security Administration (SSA) records you have not applied for SSI.

If you have applied or have scheduled an appointment to apply, please show proof of this to your worker immediately.

If you have not applied or scheduled an appointment, you must do this to keep getting EAEDC benefits. Call the SSA office at 1-800-772-1213 to schedule an appointment and to locate the SSA office closest to you. When you have done this, please show proof of this to your worker immediately.

If we do not receive proof of your SSI application within 10 days, 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 {WORKER_PHONE_NUMBER} and ask for your worker {WORKER_NAME}.

Attachment B

LANGUAGE WITH VARIABLE TEXT (ENGLISH)

{BEACON_USER_STREET_ADDRESS}
{BEACON_USER_CITY, STATE, ZIP}

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

Massachusetts Department of Transitional Assistance

{RECIPIENT_NAME}
{RECIPIENT_ADDRESS}
{RECIPIENT_CITY/TOWN, STATE, ZIP}

{RECIPIENT_SSN}
{BEACON_USER_OFFICE_NAME}

{MM/DD/YYYY}

Dear {GRANTEE}:

The Department recently sent you a letter telling you that you must appeal your recent application denial for Supplemental Security Income (SSI).

According to Social Security Administration (SSA) records you have not appealed the denial of your SSI application.

To remain eligible to receive EAEDC benefits, you must appeal this denial.

If you have filed an appeal with SSA, please show proof of this to your worker immediately.

If you have not filed an appeal, you must do this to keep getting EAEDC benefits. Call the SSA office at 1-800-772-1213 if you have any questions about how to file an appeal. When you have done this, please show proof of this to your worker immediately.

If we do not receive proof that you have filed an appeal within 10 days, 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 {WORKER_PHONE_NUMBER} and ask for your worker {WORKER_NAME}.