




William F. Weld  
Governor  
Argeo Paul Cellucci  
Lieutenant Governor

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

Joseph Gallant  
Secretary  
Claire McIntire  
Commissioner

**Field Operations Memo 97-43**  
**July 15, 1997**

**To:** Local Office Staff  
**From:**  Joyce Sampson, Assistant Commissioner for Field Operations  
**Re:** TAFDC Casework Activity

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**Overview**

The Department has initiated a series of major changes since the implementation of Welfare Reform. Our most challenging initiative is assisting the recipient population with finding a job. Welfare Reform has changed not only the way we relate to recipients but also how we conduct our day-to-day casework activities.

The Department is in the process of scheduling training sessions related to the roll-out of the Department's new technology (new PCs, PRISM II, EBT, etc.). As we proceed with the training activities we must continue to focus on moving the recipient population into employment and/or preparing them for employment with skills training opportunities.

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**Purpose of Memo**

This Field Operations Memo:

- ◆ Establishes how casework activity should be managed.
  - ◆ Explains that all contacts with a recipient do not require an actual eligibility review. However, when there is contact made with a recipient, workers should market employment, FEP, Supported Work and skills training opportunities in addition to emphasizing the effects of time-limited benefits.
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**Worker  
Responsibilities**

- ◆ Reviews should be conducted whenever case circumstances change or whenever a supervisor or a manager requests that a review be completed. **However, eligibility reviews should be conducted at a minimum of once a year on every case.** The Transitional Status Report form, TER-TAFDC (Rev. 5/97), should be used for eligibility reviews.
  - ◆ Whenever contact with a recipient occurs, workers should use the Notice of Transitional Time Limit Status/Update form, TAFDC-TLN (4/97), which was introduced in Field Operations Memo 97-25. Use of this form will document a recipient contact and the recipient's understanding of the 24-month time limit and how it applies to him or her. The availability of employment- and training-related services, day care, etc., should be explained and the recipient's response documented on the Notice of Transitional Time Limit Status/Update form, TAFDC-TLN (4/97).
  - ◆ For nonexempt individuals with a 24-month time limit, contact should be made at least quarterly to determine their status with job search, skills training, etc. or any assistance individuals may need to become self-sufficient. These contacts can be in conjunction with eligibility reviews.
  - ◆ Teen parent cases should be reviewed three times per year. PRISM II contains an alert to identify when a teen parent is turning 20.
  - ◆ Mandatory community service participants should be monitored quarterly, either by phone or via an appointment letter, with the goal of helping them find paid employment.
  - ◆ Whenever workers are in contact with recipients who are working part time, they should encourage and explain the importance of seeking full-time employment.
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**Worker  
Responsibilities  
(Continued)**

- ◆ Exempt cases should be reviewed when the youngest child turns two. PRISM II contains an alert to identify these cases.
- ◆ Cases which are exempt due to a medical disability should be scheduled for an eligibility review when the disability duration is about to expire.
- ◆ Other caseworker responsibilities include, but are not limited to:
  - Monitoring of all monthly reports and PRISM Alerts, and completion of the necessary actions required.
  - Timely processing of child care and transportation requests.
  - Reviewing PACES and ESP-MIS codes whenever a case action is required on these respective systems.
  - Monthly monitoring of sanctioned cases.
  - Review cases listed on **PA/FS Cases with Type "FS" Income on File - No Sanctioned Member** (see Field Operations Memo 97-40) and take appropriate action.

**Note:** As a result of the implementation of Welfare Reform and time-limited benefits, it is extremely important for cases to be coded correctly on PACES and ESP-MIS. When completing a case action, pay special attention to the **coding** reflected on the system, i.e., action reason, group code, SAVE code, program code, EP code and ESP code. Proper coding is important because the selection of cases and plans for recipient contact are determined from the information on PACES and ESP-MIS.

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**Questions**

Policy questions must be referred to the Policy Hotline at (617) 348-8478. Systems questions should be referred to the Systems Customer Support Services at (617) 348-5290.

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