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William D. O'Leary
Secretary

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Field Operations Memo 98-8
February 4, 1998

To: Transitional Assistance Office Staff

From: Joyce Sampson, Assistant Commissioner for Field Operations

Re: Automated Proration of Income and Shelter Costs for Households Containing FS and SSFSP Members

Introduction

PACES will now automatically prorate the income and shelter costs for households containing *both* FS-eligible and SSFSP-eligible members.

This Field Operations Memo provides instructions for entering income and shelter costs for households containing *both* FS-eligible and SSFSP-eligible members.

Applications: The procedures described in this memo must be followed for new and reopened cases.

Ongoing: All ongoing cases must be adjusted in a **timely manner to ensure accurate food stamp benefits for the March or April 1998 cyclical issuance. As many cases as possible must be adjusted in time to affect food stamp benefits for the March 1998 cyclical issuance.** See Volume I, *PACES User's Guide*, Appendix E: PACES Case Processing, Page E-5.

Note: For reopened and ongoing cases, the worker must zero out or overlay any prorated amounts currently on file **and** enter the full amount of the cash assistance grant, other income or shelter costs in accordance with this memo. (One Day Process)

**Cases Requiring
Review for
Potential
Proration
Adjustment**

A report entitled *SSFSP Cases Requiring Review for Potential Proration Adjustment* will be issued to the TAOs. The report will list category 9 cases containing *both* SSFSP and FS members ***which have income (Type OU or Type E1) on file. The cases will be listed by last digit of the case SSN in ascending order to help workers complete this project for the March or April 1998 food stamp benefit issuance. All cases must be completed by the April 1998 deadline.***

Note: This report may contain some cases which do not need to be adjusted. The report includes **all** cases containing *both* SSFSP and FS members with income coded on the file whether or not the income needs to be prorated.

The worker must annotate the report with the action taken.

**Prorating
the Cash
Assistance
Grant of an
SSFSP
Member(s)**

If an SSFSP member(s) is included in the cash assistance grant, the worker must enter client 00 *only* and the full amount of the cash assistance grant as income type GR on Line 20 in the FIW2 section of the Worksheet. *See Volume I, PACES User's Guide, Worksheet, IV-38 for a listing of Income Types.*

Note: Be sure to zero out the cash assistance grant amount from the income type G entry, if any.

**Prorating
Other
Income of an
SSFSP
Member(s)**

If an SSFSP member(s) has other income (unearned or earned), the worker must enter the full amount of the SSFSP member's income in the FIW2 section of the Worksheet on Line 20, 21, or 22.

- ▶ Enter the SSFSP member's client number, unearned income as income type OU and the full amount of the unearned income; and/or

Enter the SSFSP member's client number, earned income (wages or self employment income) as income type E1, E2 or E3 and the full amount of the earned income; ***and***

- ▶ **Enter 14 in the 30 1/3 Block.** The 14 entry will alert the system that the income is from an SSFSP member.
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**Prorating
Other
Income of an
SSFSP
Member(s)
(Continued)**

Process for Soc Sec/RR/Other Income:

If an SSFSP member has an income type *usually* entered on the Worksheet in FIW1 Section as Soc Sec/RR/Other, the income must be entered as Type OU income in the FIW2 section of the Worksheet on Line 20 for proration purposes. Be sure to enter the MED DED Code on the Worksheet in FIW1 Section, if required. These income types will not be automatically updated as part of the Monthly Update process if the case contains *both* FS-eligible and SSFSP-eligible members. ***Workers will receive a new DCR message as part of the Monthly Update stating either:***

- ▶ ***SSI MATCH -NO UPDATE- CASE ON SSFSP; or***
- ▶ ***RSDI MATCH -NO UPDATE- CASE ON SSFSP.***

Note: The SSFSP member's income was not updated as part of the RSDI/SSI COLA on January 15, 1998. You will receive an RSDI/SSI COLA exception report entitled *Category 9 Cases Containing Both FS and SSFSP Members*. This report will list cases in which an SSFSP member's RSDI or SSI income has not been updated, since proration of the new amount is necessary. The exception report should be worked in combination with the *SSFSP Cases Requiring Review for Potential Proration Adjustment* report to reduce duplicate work effort.

**Prorating
Shelter Costs**

Use the following guidelines when determining whether to prorate shelter costs.

Shelter costs do not need to be prorated if

the SSFSP member(s) has no income (either earned or unearned including a cash assistance grant) ***and*** all of the shelter costs are paid out of the FS household's income. Allow the full amount of the shelter costs as an expense to the FS household.

Shelter costs must be prorated if

shelter costs are paid by or billed to the SSFSP member ***and*** the SSFSP member has income (either earned or unearned including a cash assistance grant).

**Prorating
Shelter Costs
(Continued)**

The worker must enter the full shelter expense on the PID in Block 54.

The worker must enter the full utility expenses (whether SUA or actual) on the PID in Block 55. Enter *code 8* as the Utility Code on the PID in Block 56.

**Individuals
Ineligible for
Both FS and
SSFSP Benefits
Due to
Noncitizen
Status**

The income and shelter costs of individuals whose noncitizen status makes them **ineligible for both FS and SSFSP** must be prorated following the procedures in this memo. Cases containing such individuals in their households must be category 9 cases. The automated proration process is in place *only* for category 9.

**Proration
Clarification
Notice**

The result of automated proration will be a decrease in SSFSP benefits since the full amount of the SSFSP member's income (earned or unearned) and shelter costs will be used in the SSFSP calculation. A SSFSP decrease notice will be generated. This PACES notice will incorrectly state that the decrease is due to a change in income. A second notice will be mailed to the SSFSP household stating that the decrease was actually due to a change in the way the Department now counts the SSFSP member's income.

Reports

Annotated reports are due to the Regional Directors by the close of business on Tuesday, March 31, 1998.

Questions

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