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Secretary

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Field Operations Memo 98-23
April 24, 1998

TO: Transitional Assistance Office Staff

FROM: Joyce Sampson, Assistant Commissioner for Field Operations

RE: Clock Adjustments for Recipients Newly Added to PRISM II

Introduction

The first reconciliation between the PACES and PRISM II databases has been completed. This reconciliation resulted in the addition of 12,551 active or closed recipients previously unknown to PRISM II.

No historical information was transferred to PRISM II for these recipients. Data current as of 2/28/98 were brought over to the PRISM II database.

From among the newly added recipients, Systems staff have identified approximately 6500 active or closed recipients for whom clock periods are required. This number includes:

- TAFDC recipients requiring State 60-Month Periods and possibly the addition of months countable toward the 24-month time limit; and
- NPA Food Stamp recipients requiring Food Stamp 36-Month Periods and possibly the entering of Food Stamp Work Program months of noncompliance.

Since no historical information was transferred during reconciliation, PRISM II is unable to determine correct clock periods or 24-month time limit countable months for these recipients. Clock periods must be set manually for these recipients, and 24-month time limit countable months, as well as Food Stamp Work Program noncompliance months, must be added manually.

**Purpose of
Memo**

This memo:

- Describes the reports developed to identify recipients for whom clock periods are required;
 - Transmits procedures for determining State 60-Month Periods and Food Stamp 36-Month Periods;
 - Provides instructions for annotating the reports with:
 - ▶ State 60-Month Period start date and 24-month time limit countable months, if appropriate, or
 - ▶ Food Stamp 36-Month Period start date and Food Stamp Work Program noncompliance months, if appropriate; and
 - Explains that, once the annotated reports have been returned to the Regional Directors, Central Office staff will manually set the clock periods and add 24-month time limit countable months and Food Stamp Work Program noncompliance months.
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Reports

Two reports, titled "*State 60-Month Period and Accreted Months for TAFDC Reconciliation*" and "*Federal FS 36-Month Period and Noncompliance Months for FS Reconciliation,*" have been developed to identify recipients for whom clock periods are required.

Note: These recipients appear in PRISM II with invalid clock period dates on the Client Detail screen. The system-entered dates are:

TAFDC State 60-Month Period - 01/01/2994 - 01/01/2999

Food Stamp 36-Month Period - 01/01/2996 - 01/01/2999

**“State 60-Month
Period and
Accreted
Months for
TAFDC
Reconciliation”
Report**

The “*State 60-Month Period and Accreted Months for TAFDC Reconciliation*” report includes the following field headings as shown below:

- Case SSN
- Client SSN - client for whom 60-Month Period must be set and months accreted, if appropriate
- Client Name
- 60-Month Start Date - Transitional Assistance Workers must enter appropriate date (see instructions on next page).
- Accrete Months - Months to be reviewed for possible accretion are December 1996, January through December 1997, and January through February 1998. Transitional Assistance Workers must circle the months countable toward the 24-month time limit, if appropriate (see instructions on next page).

Note: For some recipients on the report, PRISM II had sufficient data to accrete the month of February 1998. If the month was added, it is displayed on the State Clock tab of the Client Detail screen. For recipients on the report who did not have February 1998 added, review for possible accretion.

CAN	CASE SSN	CLIENT SSN	CLIENT NAME	60-MONTH START DATE	ACCRETE MONTHS														
					1996	1997					1998								
412	012-34-5678	098-76-5432	JONES, MARY		12	1	2	3	4	5	6	7	8	9	10	11	12	1	2

**Transitional
Assistance
Worker
Responsibilities**

Transitional Assistance Workers must review the cases on the report to determine the State 60-Month Period start date, and, if appropriate, the months which should be counted toward the 24-month time limit.

*Note: This exercise must be completed even if the recipient on the report is not currently receiving TAFDC benefits. If the case reopens, the recipient will then have the correct State 60-Month Period and the correct number of months counted toward the 24-month limit. However, **priority must be given to making adjustments on active recipients.***

Determining the State 60-Month Period Start Date

The State 60-Month Period begins on:

- ▶ **December 1, 1996, for those receiving assistance on that date, or**
- ▶ **The date that an assistance unit first becomes eligible for TAFDC. For PRISM II purposes, the first full calendar month of assistance is considered the first month of the 60-month period. For example, for a case opened on 4/6/97, the 60-Month Period start date is 5/1/97.**

Transitional Assistance Workers must determine the start date of the State 60-Month Period for each recipient on the report and enter that date in the space provided. Enter only the start date (always the first of the month); PRISM II will calculate and display the correct 60-month period end date.

Note: For two-parent households, State 60-Month Periods may be different for each parent. For example, if Mary Jones was receiving assistance on 12/1/96, her 60-month start date is 12/1/96. John, her husband, was added to her grant on 6/3/97. John's 60-month start date, therefore, is 7/1/97. Remember that PRISM II is a person-based system and each recipient's 60-month start date must be researched individually.

**Transitional
Assistance
Worker
Responsibilities
(continued)**

Determining Months Countable Toward the 24-Month Time Limit

For each recipient on the report, workers must research the case record and PACES to determine whether any months, beginning with 12/96, must be counted toward the 24-month time limit.

Months must be counted if the recipient:

- was active and/or sanctioned for the entire calendar month; **and**
 - was nonexempt on PACES for the entire month; **and either**
 - received a benefit greater than or equal to \$10, or would have received more than \$10 except for protective payments or recoupment, **or**
- participated in FEP or supported work.

Follow the 24-month clock specification details found in *PRISM II User's Guide*, Appendix C, to decide if the criteria for accretion were met for each month reviewed.

For this project the 24-Month Clock Adjustment Worksheet (Attachment A) has been developed. A supply of worksheets will be sent to each TAO. A worksheet must be completed for each recipient on the report. Each month reviewed must be documented on the worksheet as to whether the month meets the criteria to be added to the recipient's clock.

Because months to be reviewed may go back as far as December 1996, careful and thorough research of the case record and PACES or MMIS is required to make an accurate determination of whether or not to count the month(s).

If necessary, complete a Recipient Financial History Inquiry form (PC-1A) to obtain a Classified Recipient Financial History report. Refer to *Systems User's Guide*, Volume 1: PACES, Chapter VIII, Other Reports, for details on this report.

**Transitional
Assistance Worker
Responsibilities
(continued)**

Circle the months to be accreted on the report. The report, along with the 24-Month Clock Adjustment Worksheet, must then be submitted to the supervisor for review and approval, then referred to the Director or Assistant Director for final approval and signature. **The final decision to accrete or not to accrete months must be made by the Director or Assistant Director.**

**Supervisor
Responsibilities**

Supervisors must:

- Review the 24-Month Clock Adjustment Worksheets for accuracy and approve the annotated reports; and
 - Submit the reports to the Director or Assistant Director for final approval and signature.
-

**Director/Assistant
Director
Responsibilities**

Directors or Assistant Directors must:

- Review the 24-Month Clock Adjustment Worksheets for all recipients on the report;
- Approve the State 60-Month Period start date;
- Approve and sign the 24-Month Clock Adjustment Worksheets;
- Ensure that a signed copy of each worksheet is filed in the case record; and
- Sign and date the report and return to the Regional Director no later than 5/15/98. Directors/Assistant Directors are advised to contact the Regional Director if there is a problem meeting this deadline.

Reminder: Managers should not manually add months to the 24-month clock for these recipients. All clock adjustments, i.e., setting the 60-Month Period and adding countable months, will be done centrally.

**“Federal FS
36-Month Period
and
Noncompliance
Months for FS
Reconciliation”
Report**

The “*Federal FS 36-Month Period and Noncompliance Months for FS Reconciliation*” report includes the following field headings as shown below:

- Case SSN
- Client SSN - client for whom 36-Month Period must be set and noncompliance months counted, if appropriate
- Client Name
- 36-Month Start Date - NPA Food Stamp workers must enter appropriate date (see instructions on next page).
- Noncompliance Months - Possible months of Food Stamp Work Program noncompliance are March through December 1997, and January through March 1998. NPA Food Stamp workers must circle months of noncompliance, if appropriate (see instructions on next page).

CAN	CASE SSN	CLIENT SSN	CLIENT NAME	36-MONTH START DATE	NONCOMPLIANCE MONTHS												
					1997 1998												
612	099-88-7766	011-22-3344	SMITH, JANE		3	4	5	6	7	8	9	10	11	12	1	2	3

**NPA Food Stamp
Worker
Responsibilities**

Food Stamp workers must review the cases on the report to determine the Federal Food Stamp 36-Month Period start date, and the months of Food Stamp Work Program (FS/WP) noncompliance, if appropriate.

Note: This exercise must be completed even if the recipient on the report is not currently receiving food stamp benefits. If the case reopens, the recipient will then have the correct Food Stamp 36-Month Period and the correct number of noncompliance month counted. However, priority must be given to making adjustments on active recipients.

**NPA Food
Stamp Worker
Responsibilities
(continued)**

Determining Federal Food Stamp 36-Month Period Start Date

The Federal Food Stamp 36-Month Period begins on:

- ▶ **January 1, 1997, for those subject to FS/WP receiving Food Stamp benefits on that date, or**
- ▶ **The date that the Food Stamp recipient subject to FS/WP first becomes eligible for Food Stamp benefits, or**
- ▶ **The date that the Food Stamp recipient becomes subject to FS/WP.**

For PRISM II purposes, the first full calendar month that the recipient is subject to FS/WP is considered the first month of the 36-month period.

Example 1: An individual subject to FS/WP applies and is approved for Food Stamp benefits on 4/6/97. His 36-Month Period start date is 5/1/97.

Example 2: An ongoing Food Stamp case contains a recipient who turned age 18 on 10/27/97. Her 36-Month Period start date is 11/1/97.

Workers must determine the start date of the Food Stamp 36-Month Period for each recipient on the report and enter that date in the space provided. Enter only the start date (will always be the first of the month); PRISM II will calculate and display the correct 36-month period end date.

Note: For households containing more than one adult, Food Stamp 36-Month Periods may be different for each adult. For example, if Jane Smith was receiving Food Stamp benefits on 1/1/97, her 36-month start date is 1/1/97. Bill, her husband, was added to her case on 6/3/97. Bill's 36-month start date, therefore, is 7/1/97. Remember that PRISM II is a person-based system and each recipient's 36-month start date must be researched individually.

**NPA Food Stamp
Worker
Responsibilities
(continued)**

Recording FS Work Program Noncompliance Months

For each recipient on the report, workers must check the case record to determine if, **beginning with 3/97**, there are any months of FS/WP noncompliance. These would currently be tracked on the Food Stamp Work Program/Noncompliance Log FS/WPL (5/97) in accordance with Field Operations Memo 97-31.

Circle months of noncompliance, if any, on the report.

Reminder: Workers should not enter months of noncompliance for these recipients directly onto PRISM II. 36-Month Periods and noncompliance months for these recipients will be entered centrally.

**Supervisor
Responsibilities**

NPA Food Stamp Supervisors must:

- Review the annotated reports for accuracy; and
 - Submit the reports to the Director or Assistant Director for review and submission to the Regional Director.
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**Director/Assistant
Director
Responsibilities**

Directors and Assistant Directors must:

- Ensure that a copy of the report is filed in the case record; and
 - Return the completed report to the Regional Director no later than 5/15/98. Directors/Assistant Directors are advised to contact the Regional Director if there is a problem meeting this deadline.
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Questions

If you have any questions, please have your Hotline designee call the Policy Hotline at (617) 348-8478. Systems questions should be directed to Customer Service Center at (617) 348-5290.



Massachusetts Department of Transitional Assistance
24-Month Clock Adjustment Worksheet

page ____ of ____

TAO _____

Date _____

Case Name _____

SSN _____

Recipient Name _____ **Client #** _____ **SSN** _____

Use this worksheet with the *Prism II User's Guide Appendix C - 24-Month Clock Specifications*.

For the **entire** calendar month of ____/____ was the recipient:
MM YY

Active and/or sanctioned? yes no

Nonexempt? yes no

Receiving a benefit amount greater than \$10 or a Full Employment Program (FEP) or a Supported Work case? yes no

If benefit amount was less than \$10, deduction code _____

Disposition/Explanation

Added Not added

For the **entire** calendar month of ____/____ was the recipient:
MM YY

Active and/or sanctioned? yes no

Nonexempt? yes no

Receiving a benefit amount greater than \$10 or a Full Employment Program (FEP) or a Supported Work case? yes no

If benefit amount was less than \$10, deduction code _____

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Nonexempt? yes no

Receiving a benefit amount greater than \$10 or a Full Employment Program (FEP) or a Supported Work case? yes no

If benefit amount was less than \$10, deduction code _____

Disposition/Explanation

Added Not added

 Worker Signature/Date

 Supervisor Signature/Date

 TAO Director/Asst Director Signature

 Date