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Fax 98- 134
Field Operations Memo 98-39
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To: Transitional Assistance Office Staff
From:  Joyce Sampson, Assistant Commissioner for Field Operations
Re: BEACON Release 1.0

Overview

BEACON Release 1.0 will be implemented on September 8, 1998. Release 1.0 includes the Employment Services Program (ESP) and the Accounts Receivable (Overpayments and Recoupment) and Bureau of Special Investigations (BSI) referral process. Referrals will now be created on-line and sent electronically to the Department's BSI Unit. In addition, BEACON includes changes to the procedures for recoupments and offsets by the Contracts and Recoveries Unit (CRU).

The Roslindale Transitional Assistance Office (TAO) has been designated as the live pilot office and is the first office to have all ESP cases converted to BEACON. All other TAOs will have BEACON installed on two PCs in their office.

Changes to the recoupment and offsets procedures by CRU impact all offices statewide. In addition, all TAOs must be able to maintain cases on BEACON that are transferred from the Roslindale TAO. Once a case is converted to BEACON, the ESP case must always be maintained on BEACON.

**Overview
(cont.)**

This memo consists of the following:

- ◆ ESP procedural changes specific only to the Roslindale TAO;
 - ◆ the offset procedural changes that impact all TAOs;
 - ◆ an explanation as to why transfer cases must be maintained on BEACON; and
 - ◆ instructions for TAOs to follow in preparation for the conversion of each TAO's ESP caseload to BEACON.
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**ESP Procedural
Changes -
Roslindale TAO
Only**

The implementation of BEACON Release 1.0 in the Roslindale TAO results in the following ESP procedural changes:

- ◆ ESP-MIS will no longer be available, except for inquiry purposes only.

Certain data that could not be changed on ESP-MIS locally can now be changed on BEACON. Specifically, the Activity Code and Code Date displayed on the Client Maintenance Screen on ESP-MIS could not be modified but can now be changed on the EDP windows in BEACON.

- ◆ EDPs are now created and maintained on-line in BEACON.
- ◆ All ESP Participation Reports (formerly the ESP-7) must be key-entered into BEACON by September 21, 1998. In subsequent months, Participation Reports must be key-entered three working days after the tenth working day of the month.

Failure to key-enter the participation information into BEACON will cause BEACON to initiate the sanctioning process.

- ◆ ESP reports are now available on-line in BEACON.

Reports are run on the 15th of each month to reflect data relative to the previous month.

**ESP Procedural
Changes -
Roslindale TAO
Only (cont.)**

- ◆ Transitional Assistance Workers should access queries to find out information about their cases.
- ◆ ARTS will be used only for the tracking of applications and reapplications.

The ESP-related function of ARTS has been eliminated. In the near future, this information will be downloaded to Approach for ad hoc queries that will combine ESP data, clock data and demographic data. You will be notified when this becomes available.

- ◆ ESP forms and notices are automatically generated based on information entered into BEACON. Workers can view documents sent to recipients and vendors by accessing Document History. If a notice is created on-line, such as a referral to a vendor, it can be viewed the same day it was created. If a notice is produced overnight, such as a notice to a recipient, it can be viewed the following day.
- ◆ The first time that a recipient is accessed on BEACON and a converted ESP activity is not associated with a resource (e.g., Employment Network), BEACON will prompt the worker to make the association. If the activity is no longer current, then the activity must be closed out.
- ◆ All non-ESP funded resources (e.g., JTPA) must be maintained by the TAO.
- ◆ Resolving BEACON only, systems-related problems will be addressed in the Roslindale office.

For the period of time that BEACON is piloted in Roslindale, and BEACON systems-related problems will not be referred to the Customer Service Center but will be dealt with in Roslindale. There will be representatives from the Systems Division, including representatives from the Customer Service Center, present in Roslindale who will be responsible for resolving system-related problems only. Any policy- or procedure- related issues/questions must be referred to the Hotline designee.

**ESP Procedural
Changes -
Roslindale TAO
Only (cont.)**

NOTE: This applies to all other TAOs as well as Roslindale. The Customer Service Center representatives can be reached in Roslindale at: (617) 469-1568.

- ◆ *Systems User's Guide* Volume 7: Child Care Authorization and 8: ESP-MIS are obsolete for Roslindale only, and replaced with the BEACON user documentation.

The BEACON user documentation replaces *Systems User's Guide* Volumes 7 and 8. The BEACON user documentation will be updated, if necessary, to incorporate changes and reissued for statewide implementation.

**Offset of Lost
Benefits
Procedural
Changes -
All TAOs**

The procedures for the offset of lost benefits by the Contracts and Recoveries Unit (CRU) in Central Office have changed. Currently, CRU intercepts food stamp benefits only. The process by which CRU intercepts lost benefits issued to recipients with recoupment on file is now contained within the BEACON application statewide. This section explains the changes in the process as it impacts cash and food stamp benefits.

Offset of Lost Cash Benefits

Beginning with the BEACON Roslindale pilot, all worker-generated PACES *daily* "Q" payment transactions will match against a special BEACON file to determine if there is an outstanding claim against the assistance unit by CRU. "Q" payment transactions that are system-generated, such as diverted Monthly Reporting cases whose grants are being restored and Clothing Allowance transactions, and any "Q" payments generated by the Finance Unit will not be included in this process. **This match will be done daily for all cases statewide, not just cases in the Roslindale TAO.**

If a match is discovered, BEACON will intercept the "Q" payment, deduct the amount owed the Department, and issue the balance of cash benefits, if any, to the recipient.

Example 1: A Transitional Assistance Worker submits a PID issuing a "Q" payment for \$100.00. BEACON determines the recipient owes \$40.00. The resulting transaction in BEACON causes PACES to issue benefits to the recipient in the amount of \$60.00.

**Offset of Lost
Benefits
Procedural
Changes - All
TAOs (cont.)**

Example 2: A Transitional Assistance Worker submits a PID issuing a "Q" payment for \$200.00. BEACON determines the recipient owes \$500.00. No payment is issued to the recipient since the recipient owes more than the amount of the "Q" payment. The amount of the "Q" payment will be deducted from the outstanding amount owed.

A BEACON notice, *Offset of Lost Benefits* notice, will be issued to the recipient advising him or her of the intercept, and either:

- tells the recipient that the difference in cash benefits is being issued (as in Example 1); or
- tells the recipient what the outstanding balance of cash benefits owed by the recipient has been reduced to (as in Example 2).

Transitional Assistance Workers will be advised of this action by the Daily Caseload Report (DCR) message "Cash Offset." **This is an informational message only and no action is necessary.**

The PACES Transaction Activity Report will identify these transactions with CAN 985 and will display the amount of the "Q" payment entered on PACES and the amount actually paid to the recipient.

Offset of Lost Food Stamp Benefits

Beginning with the BEACON Roslindale pilot, the PACES *daily* "V-07" payments and *monthly* "V-08" payments will be matched against a special BEACON file to determine if there is an *outstanding Food Stamp claim* against the household by CRU.

This match will be done monthly for all cases statewide, not just cases in the Roslindale TAO.

Note: Only "V-07" and "V-08" payments are affected by this match. No other "V" benefits are subject to offset.

If a match is discovered, BEACON will intercept the "V" payment, deduct the amount owed the Department, and issue the balance of food stamp benefits, if any, to the recipient.

**Offset of Lost
Benefits
Procedural
Changes - All
TAOs (cont.)**

Example 1: A worker submits a PID issuing a "V-07" payment for \$400.00 in food stamp benefits. BEACON determines that there is an outstanding Food Stamp claim for \$250.00. The resulting transaction in BEACON causes PACES to issue food stamp benefits to the recipient in the amount of \$150.00.

Example 2: A worker submits a PID issuing a "V-08" payment for \$100.00 in food stamp benefits. BEACON determines that there is an outstanding Food Stamp claim for \$1000.00. Since the recipient owes more than the amount of the "V" payment, no food stamp benefits will be issued.

The *Offset of Lost Benefits* notice will be issued to the recipient advising him or her of the intercept, and either:

- tells the recipient that the difference in food stamp benefits is being issued (as in Example 1); or
- tells the recipient what the outstanding balance of food stamp benefits owed by the recipient has been reduced to (as in Example 2).

Transitional Assistance Workers will be advised of this action by the DCR message "Food Stamp Offset." **This is an informational message only and no action is necessary.**

The PACES Transaction Activity Report will identify these transactions with CAN 985 and will display the amount of the "V-07" and "V-08" payment entered onto PACES and the amount actually paid to the recipient.

Transfer Cases

All TAOs will have BEACON Release 1.0 installed on at least two PCs. Designated staff have been trained on the BEACON application and will be responsible for maintaining all transfers in cases on BEACON. Once a case is converted to BEACON, the case must be maintained on BEACON. If a case in another TAO is transferred to the Roslindale TAO, the case is converted to BEACON Release 1.0 and from that point on must be maintained on BEACON.

When transferring a case to the Roslindale TAO, be sure to transfer all related closed cases as well as the ESP case.

**Preparing for
Statewide ESP
Conversion**

To prepare for the statewide ESP conversion, TAOs are reminded of the following ESP data cleanup activities:

- ◆ review the ESP Participation Report, Child Care Masterfile Report and the Work Required Cases without Work Activity - Detail Report for data integrity and follow the procedures contained in Field Operations Memo 98-9: BEACON Pre-Conversion Cleanup Reports;
- ◆ review the Component Participation and make sure that it accurately reflects the current status of the recipient; if it does not, then close the component;
- ◆ review the recipients in ESP Code 204 (Enrollee still employed after 30-day follow-up) and verify whether or not the recipient is working and that the job information is accurate. Refer to the *Systems User's Guide, Volume 8: ESP-MIS* for information and instructions regarding the various ESP codes.

Questions

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